DOCUMENT RESUME

ED 039 363 VT 011 134

TITLE	Supervisory and Administrative Management Occupations; A Suggested Curriculum Guide.
INSTITUTION	Office of Education (DHEW), Washington, D.C. Div. of Vocational and Technical Education.
REPORT NO	OE-86012
PUB DATE	70
NOTE	212p.
AVAILABLE FROM	Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402 (HE5.286:86012, $2.00)
EDRS PRICE	EDRS Price MF-$1.00 HC Not Available from EDRS.
DESCRIPTORS	Bibliographies, Course Content, *Curriculum Guides, Educational Equipment, Employment Qualifications, Federal Legislation, Instructional Materials, *Management Education, Occupational Information, *Office Occupations Education, *Supervisory Training, Unit Plan
IDENTIFIERS	Dictionary Of Occupational Titles, DOT

ABSTRACT

The implementation of instruction in vocational, adult, and continuing education, as prescribed in recent federal legislation, will be facilitated by this curriculum guide. The specific focus is on vocational office education programs in supervisory and administrative occupations. The guide contains suggested teaching units for 17 areas of general office education, 22 areas of specialized office education, and 11 areas of administrative office education. Each unit includes the total hours required for teaching the unit, teaching suggestions, standards of achievement, and a topical outline. The units are classified according to the Dictionary of Occupational Titles. The guide includes information on job descriptions, occupational prerequisites, suggested training, selection, guidance, and counseling. Also, the inclusion of occupational and training analysis and curriculum synopses makes this guide a useful tool for teachers, counselors and administrators. Sources of educational materials and a bibliography of instructional and reference materials are appended. (CH)

OE/BAVTE

V

OE 86012

ED039363

SUPERVISORY AND ADMINISTRATIVE MANAGEMENT OCCUPATIONS

A Suggested Curriculum Guide

(U.S.O.E. Code 14.0800)

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL OFFICE OF EDUCATION POSITION OR POLICY.

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE
Office of Education

Robert H. Finch, Secretary

James E. Allen, Jr., Assistant Secretary and Commissioner of Education

FOREWORD

This publication was developed to assist those involved in administering vocational office education programs in supervisory and administrative occupations. It offers suggestions for courses of study, texts, teaching materials, and other information helpful in conducting programs under current legislative enactments. The "suggested" curriculums should be adapted to meet local conditions and needs.

This guide was prepared by C. E. Leslie and Associates under contract with the U.S. Office of Education, and under the direction of Bruce I. Blackstone. Among those serving as consultants were specialists from business, industry, professional associations, and State level vocational-technical programs; faculty members of college and university business education departments; and publishers' representatives. A wide range of suggestions and approaches to the subject were received and, wherever possible, incorporated into the final document. Since the resulting materials represent many opinions, no approval or endorsement of any institution, agency, or person should be inferred.

The suggested study units for each area of specialization are intensive, enabling students to meet the job requirements of the occupational field. The study units may be modified and lengthened to include required general education studies for in-school trainees. With modifications, some of the content may be used in Manpower Development and Training Programs.

LEON P. MINEAR, *Director*
Division of Vocational and Technical Education

GRANT VENN
Associate Commissioner for Adult, Vocational, and Library Programs

ACKNOWLEDGMENTS

The completion of the guide depended upon the assistance and cooperation of many persons. The U.S. Office of Education, Division of Vocational and Technical Education, wishes to acknowledge in particular the contributions of the following:

Dr. William M. Berliner
Professor of Management and Chairman
Dept. of Management and Industrial Relations
School of Commerce
New York University
New York, N.Y. 10003

Dr. Raymond F. Brecker
Asst. Supt. for Finance and Research
Board of Education
812 City Hall
Buffalo, N.Y. 14202

Mr. Lee T. Harris
Assistant Treasurer
Parsons & Whittemore, Inc.
200 Park Avenue
New York, N.Y. 10017

Mrs. Edith M. Lynch
Vice President—Management Activities
American Association of Industrial Management
National Metal Trades Association
60 East 42 Street
New York, N.Y. 10017

Mr. Huxley Madeheim
Professor of Management
Bernard M. Baruch School of Business
and Public Administration
17 Lexington Avenue
New York, N.Y. 10010

Dr. Vernon A. Musselman
Chairman
Department of Business Education
University of Kentucky
Lexington, Ky. 40506

Mr. Samuel Person
Professor of Accounting
C. W. Post College
Long Island University
Brookville, N.Y. 11568

Dr. Harry Sherman
Consulting Psychologist
155 East 38 Street
New York, N.Y. 10021

Mr. Roderick Urquhart
Advertising Director
Manpower, Inc.
820 N. Plankinton Ave.
Milwaukee, Wis. 53203

CONTENTS

	Page
FOREWORD	iii
ACKNOWLEDGMENTS	iv
INTRODUCTION	1
HOW TO USE THE GUIDE	4
ABOUT THE DICTIONARY OF OCCUPATIONAL TITLES	6
JOB DESCRIPTIONS, OCCUPATIONAL PREREQUISITES, AND SUGGESTED TRAINING	27
OCCUPATIONAL AND TRAINING ANALYSES	44
ABOUT THE CURRICULUMS	48
CURRICULUM OUTLINES	53
CURRICULUM SYNOPSES	55
SELECTION, GUIDANCE, AND COUNSELING	62
GENERAL OFFICE EDUCATION UNITS	67
Accelerated Reading (Remedial) (AR)	67
Oral Communication (Remedial) (OC)	69
Business Correspondence (BC)	70
Business Data and Statistics (BDS)	71
Business Economics (BE)	73
Business Principles and Organization (BPO)	76
Business Reports (BR)	78
Effective Internal Communications (EIC)	79
Effective Interpersonal Relations (ER)	81
Employee Appraisal and Counseling (EAC)	84
Fundamentals of Interviewing (FI)	88
Indexing and Filing Practices (IFP)	91
Introduction to Business Data Processing (BDP)	93
Office Machines—Computing and Duplicating (OM)	95
Problem Solving Techniques (PSL)	96
Public Speaking (PS)	99
Records Management (RM)	102
SPECIALIZED OFFICE EDUCATION UNITS	105
Budgeting (B)	105
Business Contract Law (BCL)	108
Business Forecasting (BF)	109
Business Investments (BI)	111
Calculating Costs and Prices (CCP)	113
Corporate Financial Planning and Control (CFP)	116
Corporate Insurance Practice (CIP)	118
Forms Design (FD)	121
Introduction to Bids and Contracts (IBC)	123
Inventory Control Practices (ICP)	125
Job Descriptions, Specifications, and Evaluation (JD)	127
Material Specifications (MS)	130

	Page
Procedures Writing (PW)	133
Production Control Boards and Charts (CBC)	135
Production Reports, Estimates, and Schedules (RES)	138
Quality Control Practices (QC)	140
Shipping Regulations and Procedures (SRP)	142
Time and Motion Economy (TME)	146
Traffic Management (TM)	149
Union Contract Administration (UCA)	152
Wage and Salary Administration (WSA)	156
Work Simplification (WS)	159
ADMINISTRATIVE OFFICE EDUCATION UNITS	161
Basic Training Methods and Practices (BTM)	161
Developing Organizational and Operational Objectives (DOO)	165
Induction and Orientation of Employees (IOE)	169
Organizational and Manpower Planning (OMP)	172
Payroll and Employee Tax Records (PTR)	174
Performance Standards (PST)	176
Personnel Policies (PP)	178
Principles of Effective Supervision (PES)	182
Public and Community Relations (PCR)	184
Techniques of Marketing and Advertising (TMA)	186
Use of Consultants (UOC)	188
RELEVANT WORK EXPERIENCE	191
APPENDIXES	
A. Sample Suggested Lesson Plan	197
B. Physical Facilities	198
C. Sources of Educational Materials	202
D. Other Instructional and Reference Materials	205

INTRODUCTION

The Vocational Education Act of 1963, as amended, and the Manpower Development and Training Act of 1962, as amended, provide unparalleled opportunities for realistic vocational preparation for virtually all qualified and interested persons who have the potential to achieve competence in a particular occupational field. These acts reflect the concern of the Nation to utilize, and support financially, the vocational education resources of the various States for the benefit of each person and the Nation.

The Area Redevelopment Act gave Federal support for office occupations education, in addition to training in other occupations. The scope of the program, the number of people, and the areas involved, however, were modest by comparison to those affected by subsequent legislation. The Manpower Development and Training Act of 1962 (M.D.T.A.) provided Federal funds to the States for the vocational and on-the-job training of unemployed and underemployed persons. This provided them with new skills, refreshed old skills fallen into disuse, upgraded skills for job and economic advancement of the individual, and provided basic education (as needed).

Among the most popular programs offered under the M.D.T.A. were those for training in office occupations. Two U.S. Office of Education suggested curriculum guides, *OE–86006—Clerical and Record Keeping Occupations* and *OE–86007—Stenographic and Secretarial Occupations*, were developed under the M.D.T.A for use by teachers and local and State school administrators. These guides were job-oriented in accordance with the requirements for these occupations included in the *Dictionary of Occupational Titles* and other sources. The generalized nature of the job descriptions, or definitions, resulted in a clustering of skills and duties presented in those guides. There was, however, no definition of specialization studies required, except for supervisory positions. Another suggested curriculum guide, also developed by the U.S. Office of Education under the M.D.T.A., was *OE–86010—Electronic Business Data Processing Peripheral Equipment Occupations*. This guide considered the areas of study, training, and practice needed for specialization in some of the jobs associated with business data processing. In addition, it included job descriptions from the *Dictionary of Occupational Titles*, detailed occupational and course of study prerequisites, and, similar to the previously mentioned guides, standards of achievement or the objectives to be attained in each study unit.

Training programs are still being offered, expanded upon, and implemented for persons qualifying for support and education under the M.D.T.A. A 1965 amendment provides refresher and reorientation education also for unemployed professional persons.

The need for vocational education ". . . in recognized occupations (including any program designed to fit individuals for gainful employment in business and office occupations) . . ." was recognized by the Vocational Education Act of 1963. This act puts greater emphasis on office occupations training than did the M.D.T.A., by providing this type of training for students in secondary schools, as well as for other individuals. The act further states that the vocational education programs are to include guidance and counseling in connection with vocational training. This feature serves three purposes: (1) It helps select trainees who can reasonably profit from the training by evidencing the necessary aptitudes, attitudes, and capacities; (2) it helps the eligible trainee decide on a "career objective"; and (3) it helps to ascertain if employment in certain fields exists in the area.

Section 1 of the act declares its purpose and reads as follows:

> Section 1. It is the purpose of this part to authorize Federal grants to States to assist them to maintain, extend, and improve existing programs of vocational education, to develop new programs of vocational education, and to provide part-time employment for youths who need the earnings from such employment to continue their vocational training on a full-time basis, so that persons of all ages in all communities of the State—those in high school, those who have completed or discontinued their formal education and are preparing to enter the labor market, those who have already entered the labor market but need to upgrade their skills or learn new ones, and those with special edu-

cational handicaps—will have ready access to vocational training or retraining which is of high quality, which is realistic in the light of actual or anticipated opportunities for gainful employment, and which is suited to their needs, interests, and ability to benefit from such training.

A portion of section 4 (a) of the act defines the eligible training population and reads:

Section 4. (a) Except as otherwise provided in subsection (b), a State's allotment under section 3 may be used, in accordance with its approved State plan, for any or all of the following purposes:

(1) vocational education for persons attending high school;
(2) vocational education for persons who have completed or left high school and who are available for full-time study in preparation for entering the labor market;
(3) vocational education for persons other than persons who are receiving training allowances under the Manpower Development and Training Act of 1962 (Public Law 87–415), the Area Redevelopment Act (Public Law 87–27), or the Trade Expansion Act of 1962 (Public Law 87–794) who have already entered the labor market and who need training or retraining to achieve stability or advancement in employment;
(4) vocational education for persons who have academic, socioeconomic, or other handicaps that prevent them from succeeding in the regular vocational education program;
(5) construction of area vocational education school facilities;
(6) ancillary services and activities to assure quality in all vocational education programs, such as teacher training and supervision, program evaluation, special demonstration and experimental programs, development of instructional materials, and State administration and leadership, including periodic evaluation of State and local vocational education programs and services in light of information regarding current and projected manpower needs and job opportunities.

Section 8 of the act excludes ". . . any program to fit individuals for employment in occupations which the Commissioner determines, and specifies in regulations, to be generally considered professional or as requiring a baccalaureate or higher degree . . ."

The following regulations applying to section 8 of the act are taken from *Administration of Vocational Education, Rules and Regulations, Vocational Education Bulletin No. 1, Revised 1966.*

These selected abstracted sections of these rules and regulations are not to be construed as legal in any sense, but are presented here to assist users of this guide. For accuracy and completeness of the regulations, the reader is referred to the *Federal Register.*

SELECTED ABSTRACTS—PART 104—ADMINISTRATION OF VOCATIONAL EDUCATION, FEDERAL ALLOTMENTS TO STATES, RULES AND REGULATIONS

Section 104.1 (c) defines business and office occupations as ". . . occupations pursued by individuals in public or private enterprises or organizations which are related to the facilitating function of the office . . ."

Section 104.1 (1) defines an occupational field as a ". . . group of recognized occupations having substantial similarities common to all occupations in the group . . ."

Section 104.6 (a) (2) (iii) specifies that vocational education by the State which qualifies for Federal funds shall be suited to the needs, abilities, and interest of the students.

Section 104.7 (a) states that the employment offices will make occupational information regarding reasonable present and future prospects of employment in the community and elsewhere available to the State Board for Vocational Education and local educational agencies. Reciprocally, section 104.7 (b) reads: "Guidance and counseling personnel of the State board and local educational agencies working through the cooperative arrangement will make available to the public employment offices information regarding the occupational qualifications of persons having completed or completing vocational education courses in schools. The State plan shall provide how such information will be considered in the occupational guidance and placement of such persons." Both of these regulations have been used in developing the section in this guide titled, *Selection, Guidance, and Counseling,* in the prerequisites for each occupation, in the Standards of Achievement, and in the Record of Completion.

Section 104.13 (a) (2) (iii) (c) states that the State board or local educational agency responsible for vocational education shall have full charge of determining content and organization of courses and curriculums. It follows that all outlines, curriculums, teacher and trainee materials, and program plans in this guide are to be considered only as suggestions.

Section 104.13 (b) (1) provides for fitting individuals for employment in a recognized occupation. The training specified may be for entry into an occupation or for upgrading of skills to achieve stability or advancement in employment. In this guide, program plans have been designed for continuous study by the trainee beyond initial entry requirements. At the same time, trainees who desire to upgrade skills can be "slotted" or be admitted to study any subject unit for which they meet the prerequisites by exhibiting either equivalent education or proficiency as may be stated in the Standards of Achievement of the prerequisite unit(s). The course of study for upgrading trainees can be tailored by the school counselor or administrator to meet individual needs.

Section 104.13 (b) (2) states that all trainees or students will have an occupational objective which is a matter of record. The objective may be a specific occupation or a cluster of closely related occupations.

Section 104.13 (c) (2) (i), dealing with orientation of instruction, states that such instruction shall include classroom instruction, as well as field, shop, laboratory, and cooperative work, or other occupational experience. Subsection (ii) provides for the correction by instruction of whatever educational deficiencies the trainee may have that prevent him from profiting from such instruction. The scope of this guide is such that remedial education (with the exception of speech correction) is not included, but is left to the discretion of school administrators to determine and include in the school's programs.

Section 104.13 (d) (1) indicates that a State plan for vocational instruction may be supplemented by such other general education subjects as may be necessary to develop a well-rounded individual. However, section 104.13 (h) (4) says that the program of instruction is to be sufficiently extensive in duration and intensive, within a scheduled unit of time, to enable the trainee to develop employable competencies. Thus, the suggested subject units in this guide vary in length of time of study, and the schedules or programs are designed to allow inclusion of general education subjects which may be required by the State.

Section 104.17 deals with business and office occupations and provides for both subject matter and practical experience to be included in the vocational instruction. [*The Relevant Work Experience* section of this guide suggests some work experience projects that should be adjunctive to the curriculums.]

Section 104.18 details the extent of vocational guidance and counseling services. [Suggestions regarding the provisions of section 104.18 will be found in the *Selection, Guidance, and Counseling* section.]

The Vocational Education Amendments of 1968 emphasize the people aspect of vocational education, while extending and strengthening the basic law. The rules and regulations to support the amended act have not been released as of the date of publication of this curriculum guide.

The concern of the Nation for persons to be trained vocationally and to continue in school has also been expressed in other legislation. Some examples are an amendment to Social Security, the Elementary and Secondary Education Act, and amendments to the George-Barden and Smith-Hughes Acts. The Social Security Amendment, for example, provides that a person over age 18, who received Social Security benefits until age 18, can receive further benefits until age 22, provided he is a full-time student. Full-time student means a person enrolled in a normal day program, or an evening student in a course of study which will take at least 3 months and who carries a subject load sufficient to complete the course in the time normally required by a day student. Although certain persons specified in the amendment are excepted from benefits, nevertheless, it makes vocational training possible for many persons who otherwise would have had to forfeit the opportunity because of the lack of funds.

Although trainees in M.D.T.A. programs are excluded in section 4 (a) (3) of the Vocational Education Act of 1963, much of the curricular content in this guide can be used for training persons eligible under M.D.T.A.

HOW TO USE THE GUIDE

This suggested curriculum guide may be used to suit a variety of vocational education needs and conditions. It incorporates unitized subject studies and suggested patterns for continuous education to meet specific career objectives of trainees eligible under the Vocational Education Act of 1963 and the Manpower Development and Training Act of 1962, both as amended.

This guide is based on the job definitions or descriptions (including worker requirements) found in the 1965 edition of the *Dictionary of Occupational Titles*, as amended or amplified by information from professional contributors. Teachers, counselors, school administrators, and members of community vocational education committees should become acquainted with the job descriptions, worker trait requirements, and occupational prerequisites detailed in the next two sections of this guide. Since local conditions may affect some of the employment standards set forth in the occupational prerequisites, modifications may be required. The purpose of teaching should be to develop trainees to meet the suggested standards of employability. Teachers should alert counselors about trainees who are not progressing adequately. This advice will enable the counselors to help the trainee by recommending greater effort, remedial training, or discussing possible changes in the trainee's career objective in sufficient time to prevent unnecessary frustration or loss of time in vocational preparation.

Just as this type of cooperation must exist between teachers and counselors, close cooperation and full communication should also exist between teachers, counselors, school administrators, community boards, employers, and employment offices.

For example, if the selection of trainees is wrong, teaching efforts may be increased unduly and facilities may be used inefficiently. Or, if trainees have developed employable skills and work (either full time or for relevant experience development) is not available, skills and knowledge may decline from employability levels and, as a result, individual morale may be lowered. Teachers and counselors should advise department chairmen and school administrators periodically of facility and equipment needs, extent of anticipated enrollment, remedial training needs, and levels of achievement being attained with the suggested time allowances. Program offerings should be coordinated with those of other schools or with specialized area schools offering specific courses of study.

Under each job description in the *Job Descriptions* section a group of study units is suggested for the development of proficiencies. In most instances, these units can be considered as "core" education. Thus, depending on the trainee's education or experience background, units may be deleted from or added to the suggested material.

The *Curriculum Synopses* section shows typical full-time training programs that can be used to develop employable skills and knowledges in minimal time for several entry level occupations, and to provide a foundation for certain specialized higher level managerial occupations. Because of the variations in trainee qualifications for vocational education, some alteration of this basic program may be made. It is suggested, however, that the skill units sequence be maintained, wherever possible, since skills should be highest when trainees are ready to be employed.

Full-time programs, which require no specialized studies, may be offered in high schools, postsecondary, and special schools. A variety of sources for remedial work should be made available to trainees who require remedial training in order to profit from the regular program.

Programs which require elective or specialized studies may originate in the high school and be continued in the postsecondary school where the trainee's specialized skills and knowledge can be developed. Skills covered in the *Specialized Office Education Units* section may be offered in postsecondary or area schools. The studies in the *Administrative Office Education Units* section can be offered in postsecondary schools.

Provision for relevant work experience projects should be made by each local educational agency as indicated in the programs.

Since the curriculum is unitized, special part-time programs can be organized in high schools or post-

secondary schools to suit the needs of trainees. Such programs should be sufficiently intensive to meet approved State plan requirements.

Similar to the part-time programs, the skill and knowledge units can be selected to meet the needs of adults who wish to refresh or upgrade their skills. Careful assessment by counselors should be made of the trainee's claimed proficiencies and experience before suggesting a course of study.

Several of the suggested full-time programs can be used for trainees qualifying under the Manpower Development and Training Act. Because the act provides for refresher and upgrading training, the programs can be tailored to meet a variety of trainee needs as previously stated.

Each unit has suggested achievement standards. These standards are expressed in several ways, depending on the nature of the studies. Some standards, usually those dealing with basic skills, are quantitative; others are in qualitative terms regarding knowledge to be acquired, attitudes, interest, and other performance criteria not easily measured objectively. Collectively, the suggested standards for each unit of study in the program should equal or exceed the employability standards stated in the occupational prerequisites.

One unifying element suggested for the various uses to which the guide may be put is the Record of Completion. This record has several purposes:

1. It safeguards the school(s) against possible misrepresentation or error by an applicant seeking a position in the occupational field, with regard to completion of a course of study.
2. It serves as a reward to motivate a trainee to complete a course of study successfully.
3. It can be used as a transcript for school transfer purposes or future enrollment for specialization by a trainee.
4. It can be used as a base from which counselors or teachers in the same or different schools can prepare specific programs of study for the trainee.
5. It can result in a saving of time or investigation by an employment office.
6. It can be used in lieu of grades to standardize on skill and knowledge achievements, thus saving possible embarrassment of the trainee by an employer or employer's representative. It also provides a basis to compare the trainee with other trainees from different groups, rather than solely on his performance as contrasted with trainees in a given local group.
7. It can be used as an objective measurement against certain employment standards.

The record does have some shortcomings which should be noted:

1. While providing statements of trainee skill achievement in quantitative terms, it also provides for qualitative statements. These qualitative assessments, however, are usually limited to the knowledge items of study.
2. Many judgments of proficiency are left to the individual teacher. This may result in evaluation differences. When objective tests are used, some of these differences may be reduced.

A trainee who leaves a program, either after having completed his suggested program or earlier, should be given his Record of Completion indicating partial or full completion of appropriate studies. Copies of this record should be kept in the school office.

Trainee applicants should be examined for certain levels of achievement at time of admission to a vocational education program. The prerequisites for unit study may specify completion of prior units of study or demonstration by the trainee of proficiencies equivalent to the standards of achievement for those prior units. Discretion should be exercised in the evaluation of these equivalent proficiencies. The acceptance of trainees for further study should be consistent with school policies under State plans.

It is suggested that the Record of Completion show the detail of the program by skill and knowledge areas and the competencies achieved by the trainee. A folder for each trainee should include evaluations at the completion of each unit of study. Interim evaluations for record accuracy should be obtained from teachers. Teachers should incorporate the last quantitative measures of achievement by the trainee, as well as the qualitative judgments required in the unit. One suggested version of a Record of Completion is shown in the section, *Selection, Guidance, and Counseling*.

ABOUT THE DICTIONARY OF OCCUPATIONAL TITLES

The third edition of the *Dictionary of Occupational Titles*, published in 1965 by the U.S. Employment Service contains information about the world of work for use by persons engaged in manpower utilization, classification, recruitment, and selection. It is also useful for those concerned with vocational counseling, education, and training. Users of this suggested curriculum guide who may not have ready access to the *Dictionary of Occupational Titles* (D.O.T.) will find this section helpful in understanding the structure of the new D.O.T. and how information contained therein has been used in the development of the curriculum.

Since its original publication in 1939, the D.O.T. has undergone several changes to keep pace with changing job patterns and the needs of those involved in various manpower resource services. The third edition reflects the results of new occupational research and job analysis techniques, pilot studies, and contributions by industry, professional societies, trade organizations, government agencies, and subject-matter specialists. The new D.O.T. supersedes the 1949 edition of volumes I and II, supplement of March 1955, and D.O.T. part IV issued in 1944.

The major portion of volume I of the new issue is devoted to the names and definitions of various occupations arranged alphabetically by job title and their commonly used alternates. Occasionally, job titles are inverted or modified to group similar jobs and to assist users in locating a definition of a particular job. The job definitions provide or imply information about the content, execution, and purpose of the work; the nature of functions performed; the significant aptitudes, interests, temperaments, knowledges, and abilities required; and the physical demands and working conditions necessitated by the particular type of work. As a consequence, the wording of the job definitions is in broad terms, with an attempt to be all-inclusive. Not all definitions, therefore, will coincide exactly with like jobs in particular establishments or localities. A job definition usually receives the designation of the industry in which it is found. However, jobs which are found in several industries are designated by the particular type of activity. Volume I also has information about occupational classification and coding, arrangement, and uses of the Dictionary.

Volume II of the D.O.T. presents the grouping of jobs, "having the same basic occupational, industrial, or worker characteristics to help the user discern relationships among occupations; and, as a standard approach to classifying the abilities, vocational experiences, and potential of workers." The Introduction to volume II states: "It (the third edition of the D.O.T.) should be more useful to guidance and placement personnel in dealing with persons planning careers or seeking employment." In addition, volume II contains a Glossary which defines technical terms found in volume I and two appendixes which explain coding relationships and worker trait components.

DICTIONARY OF OCCUPATIONAL TITLES CODING

An explanation of the job codings for the representative jobs in administrative work covered by this curriculum will be found in this section. Pertinent information from volumes I and II has been abstracted selectively and is presented here briefly.

Each job definition has a code number of six digits which have significance for users of the D.O.T. For example, the coding for the job definition of Process Description Writer (any ind.), alternately titled Instructions Supervisor, is 012.188 in the D.O.T.

The First Three Digits

The first digit refers to an occupational *category*, the second to a *division*, and the third to a subdivision called the *three-digit group*. The nine occupational *categories* are:

0, 1 Professional, technical, and managerial occupations
2 Clerical and sales occupations
3 Service occupations
4 Farming, fishery, forestry, and related occupations

5 Processing occupations
6 Machine trades occupations
7 Bench work occupations
8 Structural work occupations
9 Miscellaneous occupations

The first digit, 0, places our sample occupation in the professional, technical, and managerial category. Category 0, 1 is defined in volume II as follows:

0 } PROFESSIONAL, TECHNICAL, AND
1 } MANAGERIAL OCCUPATIONS

This category includes occupations concerned with the theoretical or practical aspects of such fields of human endeavor as art, science, law, business relations, and administrative, managerial, and technical work. Most of these occupations require substantial educational preparation (usually at the university, junior college, or technical institute level).

The second digit, 1, places this job in an engineering division, which is defined as:

00 } OCCUPATIONS IN ARCHITECTURE
01 } AND ENGINEERING

This division includes occupations concerned with the practical application of physical laws and principles of engineering and/or architecture for the development and utilization of machines, materials, instruments, structures, processes, and services. Typical specializations are research, design, construction, testing, procurement, production, operations, and sales. Also includes preparation of drawings, specifications, and cost estimates, and participation in verification tests.

The third digit, 2, places the job in a further refined group of industrial engineering occupations, which is defined as:

012 INDUSTRIAL ENGINEERING OCCUPATIONS

This group includes occupations concerned with the design and installation of integrated systems of personnel, materials, machinery, and equipment. Accessory techniques may include those used in mechanical and various other engineering specialties. Typical specializations are plant layout; production methods and standards; cost control; quality control; time, motion, and incentive studies; and methods, production and safety engineering.

This representative job title is found under this three-digit classification and is shown below as it appears in Volume II of the D.O.T. The letters in parentheses to the left of the code numbers do not appear in the D.O.T., but are included for reference purposes and will be explained at the end of this subsection.

(a) 012.188 PROCESS DESCRIPTION WRITER
(b) instructions supervisor

Another category from which representative jobs were taken for this curriculum guide is the 16 series. Definitions for the category, division, and three-digit groups for this occupational classification are shown below along with titles for representative jobs. As before, letters in parentheses to the left of the code number will be explained later.

The first digit, 1, has been explained previously.

The second digit, 6, refers to the division within category 1 which is titled and defined as:

16 OCCUPATIONS IN ADMINISTRATIVE SPECIALIZATIONS

This division includes occupations concerned with specialized administrative and managerial functions which are common to many types of organizations. (Managerial occupations which are peculiar to one or a few related types of organizations are included in division 18.) In general, occupations included in the group listed below demand a knowledge of a particular function rather than a knowledge of the operations of an organization included in Division 18. Includes occupations which involve the more routine nonclerical duties or a combination of clerical and administrative work. Occupations involving clerical work exclusively in these fields are not included.

The third digit, 0, in the 16 series, denotes a group of jobs in accounting and auditing, and is defined as:

160 ACCOUNTANTS AND AUDITORS

This group includes occupations concerned with examining, analyzing, and interpreting accounting records for the purpose of giving advice or preparing statements and installing or advising on systems of recording costs or other financial and budgetary data.

(a) 160.288 CREDIT ANALYST, CHIEF (banking)
senior credit analyst

The third digit, 1, in this series, refers to a budget and management analysis occupations group, and is defined as:

161 BUDGET AND MANAGEMENT ANALYSIS OCCUPATIONS

This group includes occupations concerned with studying the policies, organizational structures, and administrative practices of such organizations as governmental units, in-

dustrial firms, and nonprofit groups; and reviewing periodic budgets submitted by operations personnel. Includes the preparation of reports summarizing findings and recommending to line management changes in policy, organization, and administration. Includes consolidating the budget estimates of several organizational units and preparing a unitary budget itemizing such proposed expenditures as salaries and wages, overhead, and production costs, for consideration and action by upper echelons of management.

(a) 161.118 BUDGET OFFICER (gov. ser.)
(a) TREASURER (any ind.)
(b) treasury representative
(a) 161.268 CLERICAL TECHNICAN (profess. & kin.)
(b) methods man
(a) 161.268 FILE SERVICE WORKER (bus. ser.)

A group with 2 as the third digit in the 16 series is defined as:

162 PURCHASING MANAGEMENT OCCUPATIONS

This group includes occupations concerned with negotiating and contracting for the purchase of equipment, products, and supplies for industrial plants, utilities, governmental units, or similar establishments, and the purchasing of merchandise for resale; determining quality to be purchased, costs, delivery dates, contract conditions, sources of supply, and taking inventories.

(a) 162.118 ADMINISTRATOR, CONTRACT AND ORDER (any ind.)
(b) contract administrator
(a) CONTRACT SPECIALIST (gov. ser.)
(a) 162.158 PURCHASING AGENT (any ind.)
(b) buyer
(b) director, purchasing
(b) manager, purchasing
(b) manager, supply
(b) purchaser
(a) SUPPLY REQUIREMENTS OFFICER (gov. ser.)
(c) Logistics Officer (gov. ser.)
(a) 162.168 SUPERVISOR, PROCUREMENT SERVICES (any ind.)
(b) supervisor, material control
(a) 162.188 PURCHASE-PRICE ANALYST (profess. & kin.)
(a) 162.288 TITLE CLERK (petrol. production; petrol. refin.; pipe lines)

The third digit, 4, in series 16 defines occupations in advertising management as:

164 ADVERTISING MANAGEMENT OCCUPATIONS

This group includes occupations concerned with influencing public consumption or opinion, either as an employee of the organization served or as a member of an agency under contract; managing advertising programs and campaigns; and, in advertising agencies, managing customers' accounts. Occupations concerned with planning and executing artwork are included in group 141. Occupations concerned with writing copy are included in group 139.

(a) 164.068 DIRECT-MAIL SPECIALIST (any ind.)
(b) manager, direct mail advertising
(a) 164.168 ACCOUNT EXECUTIVE (profess. & kin.)
(b) account representative

The third digit, 8, in series 16 is defined as:

168 INSPECTORS AND INVESTIGATORS, MANAGERIAL AND PUBLIC SERVICE

This group includes occupations concerned with examining people, animals, plantlife, products, and establishments, in the capacity of city, county, Federal, or private inspector or investigator, for enforcement of health, safety, and other regulatory laws.

(a) 168.168 MANAGER, CREDIT AND COLLECTION (any ind.)
(b) accounts supervisor
(b) credit man
(b) manager, credit investigations

A special grouping of jobs in almost every series in the D.O.T. is marked by the use of 9 for the third digit. This grouping takes in jobs in the series not elsewhere classified (n.e.c.). In series 16, the third-digit (9) group is defined as:

169 OCCUPATIONS IN ADMINISTRATIVE SPECIALIZATIONS (n.e.c.)

This group includes occupations, not elsewhere classified, concerned with administrative specializations.

(a) 169.168 ADMINISTRATIVE ASSISTANT (any ind.)
(b) administrative analyst
(b) administrative officer
(a) CHIEF CLERK (any ind.)
(b) manager, general office
(b) manager, general service
(b) office supervisor
(a) EXAMINER, TARIFF AND SCHEDULES (gov. ser.)
(a) INTERVIEWER AND CLAIMS ADJUSTER (gov. ser.)
(b) claims representative
(a) MANAGER, OFFICE (any ind.)
(a) PROPERTY-DISPOSAL OFFICER (gov. ser.)
(b) redistribution-and-marketing officer
(b) surplus-property disposal agent
(a) VOCATIONAL DISABILITY EXAMINER (gov. ser.)
(b) disability examiner
(a) 169.268 LOAN COUNSELOR (banking)
(b) loan-servicing officer
(a) 169.388 ESCROW OFFICER (profess. & kin.)

Another classification from which representative jobs for this curricula guide were taken is the 18 series which is defined as:

18 MANAGERS AND OFFICIALS, N.E.C.
This division includes managerial occupations which require a knowledge of the management and operations of an organization, rather than a scientific, technical, or administrative specialty. Generally speaking, these are "line management" occupations in contrast to the "staff" and "specialist" occupations included in division 16. Also includes such occupations as officers and executives of government, corporations, and nonprofit organizations; general managers; general foremen; and department heads and their assistants in industrial establishments. Many general administrators and managers are former scientific, professional, and administrative specialists. Care must be taken to classify occupations according to duties and requirements rather than an incumbent's education or experience. Occupations in the administration of a scientific, technical, or professional activity must be carefully scrutinized to determine whether they are concerned primarily with technical supervision or with general management or specialized administrative work.

Some three-digit groupings in this classification are defined below along with a listing of representative job titles chosen for this guide.

183 MANUFACTURING INDUSTRY MANAGERS AND OFFICIALS
This group includes managerial occupations concerned with plants, factories, or mills which use power-driven machines and materials-handling equipment to bring about mechanical or chemical transformation of organic or inorganic substances into products. Includes establishments engaged in assembling component parts of manufactured products where the product is not a structure.

(a) 183.118 MANAGER, BRANCH (any ind.)
(b) agent
(b) manager, area
(b) manager, division
(b) manager, plant
(c) Manager, District (any ind.)
(c) Manager, Local (any ind.)
(c) Manager, Regional (any ind).
(a) 183.168 GENERAL FOREMAN (any ind.)
(b) department foreman
(b) division foreman
(b) manager, production department
(b) process supervisor
(b) production foreman
(b) production supervisor
(b) superintendent, division
(c) Foreman, Inspection and Testing (clock & watch)
(c) General Foreman Blast Furnace (iron & steel)
(c) General Yardmaster (r.r. trans.)
(c) Manager, Graphic Arts (paper goods)
(c) Superintendent, Alloy Department (nonfer. metal alloys)

186 FINANCE, INSURANCE, AND REAL ESTATE MANAGERS AND OFFICIALS

This group includes managerial occupations concerned with banks and trust companies, credit agencies other than banks, investment companies, brokers and dealers in securities and commodity contracts, and security and commodity exchanges; all types of insurance, and insurance agents and brokers; owners, lessors, lessees, buyers, sellers, agents, and developers of real estate.

(a) 186.118 MANAGER, FINANCIAL INSTITUTION (banking; finan. inst.)
(c) Manager, Branch Bank (banking)
(c) Manager, Consumer Credit (banking; finan. inst.)
(c) Manager, Trust Company (banking; finan. inst.)
(a) TRUST OFFICER (banking) trust administrator
(a) 186.138 MANAGER, SAFE DEPOSITS (banking)
(a) 186.168 BANK CASHIER (banking)
(c) Stock Cashier (banking)
(a) MANAGER, INSURANCE OFFICE (insurance)
(b) district agent
(b) manager, agency
(a) OPERATIONS OFFICER (banking)
(c) Operations Officer, Personnel (banking)
(c) Operations Officer, Trust (banking)
(a) SUPERVISOR, CREDIT UNION (finan. inst.)

189 MISCELLANEOUS MANAGERS AND OFFICIALS, n.e.c.

This group includes miscellaneous managers and officials, not elsewhere classified.

(a) 189.118 MANAGER, INDUSTRIAL ORGANIZATION (any ind.)
(b) general manager, industrial organization
(b) manager, general
(b) manager, plant
(b) superintendent, industrial organization
(c) Director, Manufacturing (clock & watch)
(c) General Manager, Petroleum Production (petrol. production)
(c) General Manager, Refinery (petrol. refin.)
(c) Manager, Hemp Processing (cord. & twine)
(c) Manager, Transportation Organization (motor trans.; r.r. trans.; water trans.)
(a) 189.168 JUNIOR EXECUTIVE (any ind.)
(b) junior executive trainee
(a) MANAGER, TRAINEE (any ind.)
(b) staff assistant

The letters in parentheses preceding all of the above occupations indicate the type of titles, the manner of their listing, whether or not job definitions will be found for these titles in the D.O.T., and the way in which they appear in the "Occupational Group Arrangement of Titles and Codes" section of the D.O.T. All titles designated (a) are in capital letters and are classified as *base titles*. The letter (b) designates *alternate titles*. Titles indented and bearing initial capitals are designated (c) and are called *undefined related titles* in the D.O.T.

Base titles are defined in the D.O.T. *Alternate titles* appear in lower case letters and are alternates or synonyms for the title preceding them; they are not defined separately in the D.O.T. *Undefined related titles* are contained in the body of the definition of the title under which they appear, and are specializations of the more general duties as described in the definition.

The Last Three Digits

The three digits to the right of the decimal point (places 4, 5, and 6) refer to a coding which indicates the job's relationship to Data, People, and Things, respectively. They identify the highest appropriate function in each hierarchy required by the job, and when taken together indicate collectively the total level of complexity at which the worker must perform. The following table, taken from the D.O.T., presents the three groupings arranged in descending order of complexity—that is, the higher the digit, the less complex the function. Under People, the D.O.T. cautions that the relationships can only be considered in the most general sense, since the arrangement is somewhat arbitrary and each relationship represents a wide range of complexity.

Data (*4th digit*)	*People* (*5th digit*)	*Things* (*6th digit*)
0 Synthesizing	0 Mentoring	0 Setting-Up
1 Coordinating	1 Negotiating	1 Precision Working
2 Analyzing	2 Instructing	2 Operating-Controlling
3 Compiling	3 Supervising	3 Driving-Operating
4 Computing	4 Diverting	4 Manipulating
5 Copying	5 Persuading	5 Tending
6 Comparing	6 Speaking-Signaling	6 Feeding-Offbearing
7 } No significant relationship	7 Serving	7 Handling
8 }	8 No significant relationship	8 No significant relationship

NOTE: The numeral 7 in the Data hierarchy is used when the worker's involvement in the Things hierarchy is at the 0, 1, or 2 level and there is no significant relationship to Data or People.

DATA is defined in the D.O.T. as: Information, knowledge, and conceptions, related to data, people, or things, obtained by observation, investigation, interpretation, visualization, mental creation; incapable of being touched. Written data take the form of numbers, words, symbols; other data are ideas, concepts, and oral verbalization. Of significance to users of this guide are the definitions of 0, 1, 2, and 3 under Data. 0. *Synthesizing* is defined as: Integrating analyses of data to discover facts and/or develop knowledge concepts or interpretations. 1. *Coordinating* is defined as: Determining time, place, and sequence of operations or actions to be taken on the basis of analysis of data. Executing determinations and/or reporting on events. 2. *Analyzing* is defined as: Examining and evaluating data. Presenting alternative actions in relation to the evaluation is frequently involved. 3. *Compiling* is defined as: Gathering, collating, or classifying information about data, people, or things. Reporting and/or carrying out a prescribed action in relation to the information is frequently involved.

The definitions of the functions under PEOPLE, as they appear in the D.O.T., are presented below:

0. *Mentoring:* Dealing with individuals in terms of their total personality in order to advise, counsel, and/or guide them with regard to problems that may be resolved by legal, scientific, clinical, spiritual, and/or other professional principles.

1. *Negotiating:* Exchanging ideas, information, and opinions with others to formulate policies and programs and/or arrive jointly at decisions, conclusions, or solutions.

2. *Instructing:* Teaching subject matter to others, or training others (including animals) through explanation, demonstration, and supervised practice; or making recommendations on the basis of technical disciplines.

3. *Supervising:* Determining or interpreting work procedures for a group of workers, assigning specific duties to them, maintaining harmonious relations with them, and promoting efficiency.

4. *Diverting:* Amusing others.

5. *Persuading:* Influencing others in favor of a product, service, or point of view.

6. *Speaking-Signaling:* Talking with and/or signaling people to convey or exchange information. Includes giving assignments and/or directions to helpers or assistants.

7. *Serving:* Attending to the needs or requests of people or animals or the expressed or implicit wishes of people. Immediate response is involved.

The jobs covered by this curriculum have the numeral 8 as a designation for the THINGS hierarchy, indicating that these jobs are not involved with the manipulation of machinery or instruments to any appreciable degree.

Referring back to the six-digit number given for the jobs, the last three digits can now be interpreted as to the types of demands made of the worker to carry out the job's relationship with respect to Data, People, and Things.

WORKER TRAITS

Each worker trait group is defined by presenting narrative information that describes the work performed, indentifies significant worker requirements, suggests possible clues that may be useful in relating applicants for employment with the job requirements, and gives a general picture of typical training and methods of entry for the jobs listed in the group.

In addition to the narrative information, the D.O.T. display of the worker trait grouping shows related classifications of work and a qualifications profile. These displays are found in Volume II of the D.O.T.

in the section titled, "Worker Traits Arrangement of Titles and Codes." The details necessary to explain the qualifications profile are found in Appendix B, "Explanation of Worker Trait Components," volume II. The worker trait components are training time, both general educational development (GED) and specific vocational preparation (SVP); aptitudes (Apt.); interests (Int.); temperaments (Temp.); and physical demands or capacities (Phys. Dem. or Cap.). In addition, related jobs are listed on the display. These jobs are taken from pages directly succeeding the exhibit in the D.O.T.

Displays of interest to users of this guide are exhibited on the following pages. Summary of information useful for interpreting the coding contained in each exhibit can be found on the pages immediately following the exhibits.

EXHIBIT I

ADMINISTRATION

.118; .168

Work Performed

Work activities in this group primarily involve formulating and carrying out administrative principles, practices, and techniques in an organization or establishment. These activities typically entail program planning, allocation of responsibilities to organizational components, monitoring the internal activities of these components, and coordinating their achievements in a manner that will insure success of the overall objective.

Worker Requirements

An occupationally significant combination of: Organizational ability to plan, formulate, and execute policies and programs; capacity to acquire knowledge of various administrative concepts and practices and successfully apply them to different organizational environments; verbal facility to deal effectively with persons at all levels; facility with numbers to prepare and review various financial and material reports; ability to relate to people in a manner to win their confidence and establish rapport; flexibility to adjust to changing conditions; and an analytical mind to solve complex problems.

Clues for Relating Applicants and Requirements

Successful achievement and advancement in lower level jobs in similar or related fields.

Educational background that includes business or governmental administration coursework.

Extracurricular or leisure-time activities and positions held that have afforded opportunities to acquire organizational skills, such as serving as community chairman of charity drives and production manager of amateur plays.

Training and Methods of Entry

Entry into this type of work may be accomplished in a variety of ways. Applicants frequently enter after years of experience, working up from lower level positions in which they have become familiar with the policies and operations of an organization or activity and have impressed with their efficiency, initiative, judgment, and organizational ability.

Many organizations have established administrative training programs. They hire promising college graduates, usually those with a degree in business administration, and funnel them through a training program designed to familiarize them with the functions of all phases of the organizational network and thereby prepare them to step into administrative positions.

RELATED CLASSIFICATIONS

Accounting, Auditing, and Related Work (.188; .288) p. 252
Business Training (.228) p. 241
Consultative and Business Services (.168; .268) p. 248
Contract Negotiating and Related Work (.118; .168) p. 239
Managerial Work (.168) p. 245

QUALIFICATIONS PROFILE

GED: 5 6
SVP: 8 9

Apt:	GVN	SPQ	KFM	EC
	1 1 2	4 4 4	4 4 4	5 5
	2 2 3	3 3 3		4

Int: 5 2 6
Temp: 4 5 1 9
Phys. Dem: S L 5

16	ADMINISTRATIVE SPECIALTIES
161.	Budget and Management Analysis
161.118	BUDGET OFFICER (gov. ser.) TREASURER (any ind.)
162.	Purchasing Management
162.118	ADMINISTRATOR, CONTRACT AND ORDER (any ind.) CONTRACT SPECIALIST (gov. ser.)
18	MANAGERIAL WORK, N.E.C.
183.	Manufacturing Industry Management
183.118	MANAGER, BRANCH (any ind.)
186.	Finance, Insurance, and Real Estate Management
186.118	MANAGER, FINANCIAL INSTITUTION (banking; finan. inst.) TRUST OFFICER (banking)
186.168	BANK CASHIER (banking)
189.	Miscellaneous Managerial Work, n.e.c.
189.118	MANAGER, INDUSTRIAL ORGANIZATION (any ind.)

EXHIBIT II

SUPERVISORY WORK (CLERICAL, SALES, AND RELATED ACTIVITIES)

.138

Work Performed

Work activities in this group primarily involve supervising and coordinating the activities of personnel engaged in clerical, sales, and related work.

Worker Requirements

An occupationally significant combination of: Ability to become thoroughly familiar with one or more clerical or sales activities; ability to plan ahead and to make assignments in a manner which promotes coordinated action and the completion of individual tasks according to established priorities; verbal ability to communicate effectively, orally and in writing, with superiors and subordinates; clerical aptitude to detect errors in correspondence, statistical tabulations, price lists, inventory records, and time tables; ability to motivate people to work cooperatively and conscientiously in activities which are frequenty routine and repetitive; and ability to perform work done by subordinates and to train new employees when required.

Clues for Relating Applicants and Requirements

Good grooming.
Facility with language.
Desire to deal with people.
Leadership in community activities.
Success in clerical, sales, or related work at a different level of endeavor.

Training and Methods of Entry

Entry into this kind of work is frequently accomplished by promotion from other positions within an organization. Courses in supervisory practices are frequently required. Another method of entry is the completion of merchandising and business management courses.

RELATED CLASSIFICATIONS

Managerial Work (.168) p. 245
Purchase and Sales Work (.158; .168) p. 484
Demonstration and Sales Work (.258; .358; .458) p. 488
Classifying, Filing, and Related Work (.388) p. 276

QUALIFICATIONS PROFILE

GED:	4	5		
SVP:	7	8	6	
Apt:	**GVN**	**SPQ**	**KFM**	**EC**
	2 3 3	4 4 3	4 4 4	5 5
	2 2	3 3 4		4
Int:	2	5		
Temp:	4	5		
Phys. Dem:	S	L	5	

18 MANAGERIAL WORK, N.E.C.
186. Finance, Insurance, and Real Estate Management
186.138 MANAGER, SAFE DEPOSITS (banking)

EXHIBIT III

MANAGERIAL WORK

.168

Work Performed

Work activities in this group primarily involve organizing and coordinating the functions of a unit, department, or branch of an organization or establishment. Certain activities are concerned with the managing of one organization that is part of a larger chain or of an establishment of limited size and diversification. Also included is the planning and coordination of a singular program, project, or other organized endeavor, either public or private, originated for a specific purpose.

Worker Requirements

An occupationally significant combination of: Ability to plan, initiate, and execute programs; ability to understand, interpret, and apply procedures and directives; numerical facility to analyze and use statistics and maintain production and inventory controls and records; leadership qualities; verbal facility; and the ability to relate to people in order to motivate and direct employees and to maintain good employer-employee and customer relationships.

Clues for Relating Applicants and Requirements

Successful experience in applicable work field at lower levels.
Academic preparation in pertinent coursework, such as business management.
Leadership qualities as indicated by elective offices held in academic or community environment.
Expressed interest in assuming management responsibilities.

Training and Methods of Entry

Promotion from within is the most common method employed for filling positions in this group. In some cases, however, employers desire new ideas, new techniques, new procedures, and new personalities, and recruit from outside the organization.

Most of the larger employers consider only those individuals who are recent college graduates. They look for an educational background consisting of appropriate personnel, vocational, business, merchandising, or similar coursework, and then provide their new employees with management-trainee programs which usually entail a combination of special training seminars and actual on-the-job training.

RELATED CLASSIFICATIONS

Administration (.118; .168) p. 237
Consultative and Business Services (.168; .268) p. 248
Supervisory Work (Clerical, Sales, and Related Activities) (.138) p. 243
Engineering, Scientific, and Technical Coordination (.168) p. 375

QUALIFICATIONS PROFILE

GED: 4 5
SVP: 6 7 8

Apt.	GVN	SPQ	KFM	EC
	2 2 3	4 4 2	4 4 4	5 5
	1 1 2			

Int: 5 2 3
Temp: 1 4 5 9 0
Phys. Dem: S L

16	ADMINISTRATIVE SPECIALTIES
162.	Purchasing Management
162.168	SUPERVISOR, PROCUREMENT SERVICES (any ind.)
164.	Advertising Management
164.168	ACCOUNT EXECUTIVE (profess. & kin.)
168.	Inspecting and Investigating, Managerial and Public Service
168.168	MANAGER, CREDIT AND COLLECTION (any ind.)
169.	Administrative Specialties, n.e.c.
169.168	ADMINISTRATIVE ASSISTANT (any ind.) CHIEF CLERK (any ind.) MANAGER, OFFICE (any ind.) PROPERTY-DISPOSAL OFFICER (gov. ser.)
18	MANAGERIAL WORK, N.E.C.
183.	Manufacturing Industry Management
183.168	GENERAL FOREMAN (any ind.) II
186.	Finance, Insurance, and Real Estate Management
186.168	MANAGER, INSURANCE OFFICE (insurance) OPERATIONS OFFICER (banking) SUPERVISOR, CREDIT UNION (finan. inst.)
189.	Miscellaneous Managerial Work, n.e.c.
189.168	JUNIOR EXECUTIVE (any ind.) MANAGER TRAINEE (any ind.)

EXHIBIT IV

CONSULTATIVE AND BUSINESS SERVICES

.168; .268

Work Performed

Work activities in this group primarily involve examining methods, procedures, and problems existing in clerical, statistical, budgetary, organizational, and similar areas of concern, and recommending improvements or solutions. Typically, workers consult with clients; conduct research in order to amass complete details; evaluate the situation in relation to proven, successful programs and techniques; and present recommendations. The implementation of suggestions and findings is frequently involved.

Worker Requirements

An occupationally significant combination of: The capacity to learn and apply principles and techniques involved in subject matter areas; verbal facility and the ability to relate to people in consultation or gathering of information; numerical ability for dealing with statistical and budgetary matters; attention to detail and clerical perception for examining records and preparing reports; ability to adjust to different environments and grasp varying concepts and procedures; and organizational ability.

Clues for Relating Applicants and Requirements

Successful academic record in appropriate business administration courses.

Work experience in related fields, such as accounting, statistics, or budget.

Experience organizing extracurricular programs in school, such as charity drives, or dances.

Training and Methods of Entry

Many individuals who enter this field do so by utilizing experience gained in more specific lines of work, such as accounting or statistics. Employers generally prefer workers who have achieved a high degree of proficiency in the specific subject matter area.

A college degree in business administration is practically a necessity for entry. Some consultant firms will hire college graduates with outstanding potential on a trainee basis, and will advance them as they gain experience.

RELATED CLASSIFICATIONS

Accounting, Auditing, and Related Work (.188; .288) p. 252
Contract Negotiating and Related Work (.118; .168) p. 239
Administration (.118; .168) p. 237
Supervisory Work (Clerical, Sales, and Related Activities) (.138) p. 243
Business Training (.228) p. 241
Title and Contract Search and Analysis and Related Work (.288) p. 254

QUALIFICATIONS PROFILE

GED: 5
SVP: 7 5

Apt:	GVN	SPQ	KFM	EC
	2 2 1	3 4 1	4 4 4	5 4
	2	2	5 5 5	5

Int: 2 9
Temp: 1 4 5 0
Phys. Dem: S L 4 5 6

16 ADMINISTRATIVE SPECIALTIES
161. Budget and Management Analysis
161.268 CLERICAL TECHNICIAN (profess. & kin.)
FILE SERVICE WORKER (bus. ser.)
169. Administrative Specialties, n.e.c.
169.268 LOAN COUNSELOR (banking)

EXHIBIT V

ACCOUNTING, AUDITING, AND RELATED WORK

.188; .288

Work Performed

Work activities in this group primarily involve the application of the principles of accounting, cost analysis, and statistical analysis to problems of fiscal management, auditing, and the like. Typically, workers are engaged in devising accounting systems and procedures; appraising assets and evaluating costing methods, investment programs, and monetary risks and rates; and preparing statistical tabulations and diagrams and financial reports, statements, and schedules for use by management.

Worker Requirements

An occupationally significant combination of: Ability to concentrate for long periods; good vocabulary and verbal expression; organizational ability; speed and accuracy in making numerical determinations; memory for detail; and the ability to understand the principles of accounting, statistics, and fiscal management.

Clues for Relating Applicants and Requirements

Level of attainment in language and mathematics as indicated by scores on aptitude tests and grades in educational courses.
Interest in working with numbers.
Interest in business activities.
Positions held (treasurer) in social and other organizations.

Training and Methods of Entry

A bachelor's degree in accounting and business administration is usually the minimum requirement for entrance into this work.

Adequate academic preparation should include courses in all phases of accounting and statistics, industrial and personnel management, marketing techniques, money and banking, investments, and insurance. Individuals with a degree qualify for many beginning jobs in budgeting, cost accounting, sales, or marketing, either in Government or private industry.

Positions entailing a degree of responsibility are usually reserved for those who have obtained a CPA (certified public accountant) certificate by passing rigorous examinations and meeting the educational and experience requirements prescribed by law in each State. Although most States require a college degree and 2 years of experience, requirements do vary and information on registration and certification should be obtained directly from the State board of accountancy in the State where the individual plans to practice.

RELATED CLASSIFICATIONS

Administration (.118; .168) p. 237
Computing and Related Recording (.388; .488) p. 280
Consultative and Business Services (.168; .268) p. 248

QUALIFICATIONS PROFILE

GED: 5
SVP: 7 8

Apt:	GVN	SPQ	KFM	EC
	1 2 1	4 4 2	4 4 4	5 5
	2 1 2		3 3 3	

Int: 1 7 9
Temp: 4 9 0 Y
Phys. Dem: S 4 6

16 ADMINISTRATIVE SPECIALTIES
160. Accounting and Auditing
160.288 CREDIT ANALYST, CHIEF (banking)
162. Purchasing Management
162.188 PURCHASE PRICE ANALYST (profess. & kin.)

EXHIBIT VI

TITLE AND CONTRACT SEARCH AND ANALYSIS AND RELATED WORK

.288

Work Performed

Work activities in this group primarily involve examining, authenticating, and preparing such legal and business documents as titles, contracts, mortgages, and liens.

Work Requirements

An occupationally significant combination of: The ability to acquire the necessary understanding of official or legal business terminology and documentary regulations; organizational and analytical ability for scanning documents, deriving pertinent points, and recording conclusions; and good reading comprehension and speed.

Clues for Relating Applicant and Requirements

Level of attainment in language and reasoning ability as indicated by scores on aptitude tests and grades in educational courses.
Clear, coherent speech or writing.
Expressed preference for research work.

Training and Methods of Entry

Entry into this kind of work frequently requires the completion of coursework in law or business and familiarity with the specific type of activity involved. A college degree or considerable college or night school coursework with an emphasis on business or the law provides excellent preparation for entry. Employers will often consider the individual who has achieved a high degree of proficiency at less complex work in the same activity, provided he has been exposed to documentary terminology and regulations.

RELATED CLASSIFICATIONS

Legal and Related Work (.108; .118; .168) p. 425
Investigating, Protecting, and Related Work (.168; .268) p. 416
Technical Writing and Related Work (.188; .288) p. 387
Translating, Editing, and Related Work (.288) p. 528
Classifying, Filing, and Related Work (.388) p. 276

QUALIFICATIONS PROFILE

GED: 5
SVP: 7 6

Apt:	GVN	SPQ	KFM	EC
	2 1 3	4 4 2	4 4 4	5 5
	1 2 2	3		

Int: 2 6
Temp: 9 0
Phys. Dem: S 6

16 ADMINISTRATIVE SPECIALTIES
162. Purchasing Management
162.288 TITLE CLERK (petrol. production; petrol. refin.; pipe lines)

EXHIBIT VII

CLASSIFYING, FILING, AND RELATED WORK

.388

Work Performed

Work activities in this group primarily involve gathering together, classifying, sorting, and/or filing correspondence, account records, business forms, and related data. The preparation of reports and keeping of records is frequently involved.

Worker Requirements

An occupationally significant combination of: Reading comprehension in order to obtain pertinent information; numerical facility for performing arithmetic computations; accuracy and attention to detail for close clerical work; and the ability to follow instructions and established procedures in doing routine work.

Clues for Relating Applicants and Requirements

Successful completion of commercial coursework in high school.
Preference for routine, organized, stable work situation.
Neatness.
Legible handwriting.

Training and Methods of Entry

Graduation from high school with successful completion of commercial courses and demonstrated familiarity with elementary clerical skills will usually qualify an individual for entry into this work. Many employers administer tests designed to show the applicant's suitability for employment of this nature.

A period of on-the-job training ranging up to 3 months is usually sufficient to familiarize entry workers with clerical procedures and forms used in specific establishments.

RELATED CLASSIFICATIONS

Computing and Related Recording (.388; .488) p. 280
Typing and Related Recording (.588) p. 287
Routine Checking and Recording (.588; .688) p. 289
Facilities, Services, and Movement Allocating and Expediting Work (.368) p. 265

QUALIFICATIONS PROFILE

GED: 4 3
SVP: 3 4 5 2 6
Apt: GVN SPQ KFM EC
3 3 3 4 3 3 4 4 4 5 5
2 4 2 4
Int: 2 3 9
Temp: 2 3 Y
Phys. Dem: L 3 4

16 ADMINISTRATIVE SPECIALTIES
169. Administrative Specialties, n.e.c.
169.388 ESCROW OFFICER (profess. & kin.)

EXHIBIT VIII

TECHNICAL WRITING AND RELATED WORK

.188; .288

Work Performed

Work activities in this group primarily involve preparing written descriptions of technical operations and developments, kinds and uses of industrial property, and structural and functional relationships of machines and equipment. Typically, workers are engaged in collecting information by observing industrial activities, interviewing supervisory and technical personnel, and reading or studying engineering drawings, journals, manuals, and other technical materials; in revising and correcting previously prepared written materials; in describing new or improved work methods, processes, standards, and workpieces; and in writing service manuals, bulletins, articles, and other technical publications.

Worker Requirements

An occupationally significant combination of: Ability to grasp technical subject matter and terminology; lucid verbal expression; ability to visualize spatial relationships of objects on flat surfaces; and analytical ability and logic in organizing material.

Clues for Relating Applicants and Requirements

Level of attainment in language and reasoning ability as indicated by scores on aptitude tests and grades of educational courses.
Interest in scientific and technological developments.
Kind of literature read, such as technical or scientific magazines.
Previous experience in writing, as on school newspapers.

Training and Methods of Entry

A bachelor's degree is frequently required for entry into this work. Ideally, this degree should be in technical writing, but few schools offer complete programs for such a degree. As a result, employers look with favor upon those with a degree in journalism or English with some training in scientific or technical subjects and individuals with a scientific or technical education who have exhibited writing skills.

Technicians with writing skills frequently transfer into this kind of work.

RELATED CLASSIFICATIONS

Engineering and Related Work (.187) p. 381
Engineering, Scientific, and Technical Coordination (.168) p. 375
Industrial Engineering and Related Work (.188; .288) p. 383
Journalism and Editorial Work (.018; .038; .068) p. 522
Technical Work, Engineering and Related Fields (.181; .281) p. 379

QUALIFICATIONS PROFILE

GED: 5
SVP: 7 6
Apt: GVN SPQ KFM EC
2 2 3 2 4 3 4 4 4 5 5
1 1 4 3
Int: 7 6
Temp: 0
Phys. Dem: S 6

00 01 ARCHITECTURE AND ENGINEERING
012. Industrial Engineering
012.188 PROCESS-DESCRIPTION WRITER (any ind.)

EXHIBIT IX

INVESTIGATING, PROTECTING, AND RELATED WORK

.168; .268

Work Performed

Work activities in this group primarily involve conducting investigations and examinations designed to determine or insure compliance with statutes, ordinances, and similar regulations affecting the public interest and welfare; and otherwise enforcing laws or regulations designed to protect the citizenry from harm to themselves or their property.

Worker Requirements

An occupationally significant combination of: Capacity to acquire knowledge of laws and regulations and learn investigative procedures and methods; verbal ability to converse with people at varied levels; tact and diplomacy in order to establish rapport with people; ability to perform under stress and maintain equanimity in the face of danger or resistance; organizational ability in order to gather and evaluate facts; an assurance of manner that will gain confidence and respect; and physical stamina.

Clues for Relating Applicants and Requirements

Expressed preference for public-contact work.
Experience as safety-patrol guide after school.
Success in pertinent academic subjects, such as criminology.
Personal reading preferences, such as detective stories and legal biographies.

Training and Methods of Entry

A high school education is a prerequisite for entry into a majority of positions in this group. In some cases, college education is required. The educational requirement depends upon the responsibility of the job. In most instances, individuals are required to pass rigid entrance exams and then undergo intensive formal training followed by a period of on-the-job breaking in under the tutelage of an experienced worker.

RELATED CLASSIFICATIONS

Appraising and Investigating Work (.187; .284; .287) p. 420
Legal and Related Work (.108; .118; .168) p. 425
Protecting and Related Work (.868; .878) p. 427

QUALIFICATIONS PROFILE

GED: 5 4
SVP: 7 5 6 8

Apt:	GVN	SPQ	KFM	EC
	2 2 3	4 4 4	4 4 4	5 4
	3 2 3	3 3		5
	4	2		

Int: 2 5 6
Temp: 4 5 8 9
Phys. Dem: S L 4 5 6

16 ADMINISTRATIVE SPECIALTIES
169. Administrative Specialties, n.e.c.
169.168 EXAMINER, TARIFF AND SCHEDULES (gov. ser.)
INTERVIEWER AND CLAIMS ADJUSTER (gov. ser.)
VOCATIONAL DISABILITY EXAMINER (gov. ser.)

EXHIBIT X

PURCHASE AND SALES WORK

.158; .168

Work Performed

Work activities in this group primarily involve applying a knowledge of contracts, credit and marketing conditions, and sales methods to a merchandising situation. Frequently, the worker must have a technical knowledge of materials or products involved.

Worker Requirements

An occupationally significant combination of: Ability to acquire and apply a knowledge of contracts, credit, marketing conditions, and sales psychology; ability to relate to people at all levels; powers of persuasion; verbal facility; numerical ability in certain instances; and initiative and drive.

Clues for Relating Applicants and Requirements

Experience selling tickets for benefit school shows.
Experience soliciting advertisements for high school yearbook.
Volunteer canvassing work for local charities.
Outgoing personality and good grooming evident in an interview.

Training and Methods of Entry

The larger and more progressive employers require that applicants possess a college background or night school credits. Courses in business administration, marketing, and related fields will give the individual excellent preparation. Most large organizations have formal programs that are designed to develop the individual's proficiency through on-the-job training under supervision and classroom instruction. Frequently, entry is gained by advancement from subordinate positions within an organization, wherein a knowledge of merchandising concepts and procedures has been acquired through experience and exposure.

RELATED CLASSIFICATIONS

Sales Engineering (.151) p. 373
Demonstration and Sales Work (.258; .358; .458) p. 488
Selling and Related Work (.858) p. 493
Contract Negotiating and Related Work (.118; .168) p. 239
Sales and Service Work (.251) p. 486

QUALIFICATIONS PROFILE

GED: 4 5
SVP: 6 7 5

Apt:	GVN	SPQ	KFM	EC
	2 2 2	4 3 4	4 4 4	5 4
	3	3 4 3		3

Int: 2 5
Temp: 5 7 9
Phys. Dem: L 5

16 ADMINISTRATIVE SPECIALTIES
162. Purchasing Management
162.158 PURCHASING AGENT (any ind.)

EXHIBIT XI

PROMOTION AND PUBLICITY

.068

Work Performed

Work activities in this group primarily involve planning, directing, and conducting advertising and public relations programs designed to promote the sale of products and services, create good will, and/or establish a favorable public image.

Worker Requirements

An occupationally significant combination of: Ability to understand and apply principles and techniques of advertising, publicity, and consumer and market research; verbal facility to communicate clearly and effectively; organizational ability to plan and direct surveys and campaigns; originality to develop practical approaches to unique problems; self-confidence and initiative to assume responsibility and to make decisions; perserverance to deal with problems involving persistent frustrations; and persuasiveness to deal with people in competitive situations.

Clues for Relating Applicants and Requirements

Leadership qualities and initiative as demonstrated in extracurricular activities at school.
Expressed preference for public contact work.
Outgoing personality evident in an interview.
Part-time retail sales experience.

Training and Methods of Entry

Although a liberal arts college background is preferred by most employers, individuals having a high school education and outstanding personal qualifications may find opportunities for employment in promotion and publicity work. Experience in such related fields as retail sales or journalism, and such post-high-school instruction as night school or correspondence courses in English, history, psychology, sociology, advertising, and economics will greatly aid the individual without a college degree.

Entry into this field, with or without college background, depends much on the individual's initiative and his success at selling himself to prospective employers. Small manufacturers, dealers, and agencies often provide the better opportunity for beginners to apply their talents and to find their specialty. Competition among new entrants is especially keen, but there are exceptional advancement opportunities for people who demonstrate special ability.

RELATED CLASSIFICATIONS

Creative Writing (.088) p. 524
Journalism and Editorial Work (.018; .038; .068) p. 522
Administration (.118; .168) p. 237
Purchase and Sales Work (.158; .168) p. 484
Social Science, Psychological, and Related Research (.088) p. 294

QUALIFICATIONS PROFILE

GED: 5
SVP: 7

Apt:	GVN	SPQ	KFM	EC
	2 2 3	3 3 3	4 4 4	5 5
	1 1	4 4		

Int: 2 5 6 8
Temp: 4 5 7 9
Phys. Dem: S L 5

16. ADMINISTRATIVE SPECIALTIES
164. Advertising Management
164.068 DIRECT-MAIL SPECIALISTS (any ind.)

The following is a brief explanation of the symbols and digits used in the qualifications profile.

GED—General Educational Development. The GED in the qualifications profile is specified at levels 3, 4, 5, or 6 in accordance with the specific job requirements. These numbers do not refer to school grades, but rather to the stage of reasoning, mathematical development, and language development required to do each job. The following summary should clarify the levels:

Level	*Reasoning*	*Mathematical Development*	*Language Development*
6.	Application of logical or scientific thinking to intellectual and practical problems; deal with nonverbal symbolism, and abstract and concrete variables.	The application of advanced and statistical techniques, such as differential calculus, or other theoretical mathematical concepts to problems.	The ability to report, write, and edit articles for publication; prepare and deliver lectures; interview, counsel, or advise people regarding matters that affect them.
5.	Application of logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions; interpret a variety of instructions and deal with abstract and concrete variables.	Same as above.	Same as above.
4.	Application of rational systems, such as bookkeeping, to problems, and to the interpretation of instructions.	The use of ordinary arithmetic, algebraic, and geometric procedures in standard applications.	The ability to interview and screen people, including job applicants, and write routine correspondence.
3.	Application of common sense to carry out oral or written instructions; to deal with problems involving several concrete variables in standard situations.	The ability to make arithmetic calculations involving fractions, decimals, and percentages.	The ability to file, post, and mail materials such as forms or checks; to copy data from one record to another; to fill in forms; to interview people; to obtain information.

SVP—Specific Vocational Preparation. SVP indicates the training received under a variety of circumstances and is expressed in units of time:

9—Over 10 years.
8—Over 4 years up to and including 10 years.
7—Over 2 years up to and including 4 years.
6—Over 1 year up to and including 2 years.
5—Over 6 months up to and including 1 year.
4—Over 3 months up to and including 6 months.
3—Over 30 days up to and including 3 months.
2—Anything beyond short demonstration up to and including 30 days.

In the qualifications profile for Administration (.118; .168), the use of Codes 8 and 9 indicates that some of the occupations in their grouping require more training than others.

Apt.—Aptitudes. The letters used to specify aptitudes are defined as follows:

G—Intelligence or general learning ability.
V—Ability to use and understand meanings and relationships of words and verbally expressed ideas.
N—Ability to perform arithmetical operations quickly and accurately.
S—Ability to comprehend forms in space and to visualize objects and geometric forms.
P—Ability to perceive pertinent details in objects or pictorial representations.
Q—Ability to perceive pertinent details in verbal or tabular materials, to observe differences in copy, to proofread words and numbers, and to avoid perceptual errors in arithmetic computations.
K—Ability to coordinate eyes and hands or fingers when making precise, rapid movements.
F—Finger dexterity.
M—Ability to use hands skillfully.
E—Eye-hand-foot coordination.
C—Ability to recognize color values, such as contrast and harmony, and the ability to match colors.

In the qualification profiles, certain aptitude symbols appear in boldface type. These aptitudes are considered to be the significant aptitudes required for average successful job performance.

1—The top 10 percent of the population: This segment possesses an extremely high degree of the aptitude.
2—The highest third, exclusive of the top 10 percent, of the population: This segment possesses an above average or high degree of the aptitude.
3—The middle third of the population: This segment possesses a medium degree of the aptitude, ranging from slightly below to slightly above average.
4—The lowest third, exclusive of the bottom 10 percent, of the population: This segment possesses a below average or low degree of the aptitude.
5—The lowest 10 percent of the population: This

segment possesses a negligible degree of the aptitude.

Int.—Significant Interests. The significant interests in the exhibited profiles are 1, 2, 3, 5, 6, 7, 8, and 9. These are defined as:

1—Situations involving a preference for activities dealing with things and objects.

2—Situations involving a preference for activities involving business contact with people.

3—Situations involving a preference for activities of a routine, concrete, organized nature.

5—Situations involving a preference for activities resulting in prestige or the esteem of others.

6—Situations involving a preference for activities concerned with people and the communication of ideas.

7—Situations involving a preference for activities of a scientific and technical nature.

8—Situations involving a preference for activities of an abstract and creative nature.

9—Situations involving a preference for activities that are nonsocial in nature, and are carried on in relation to processes, machines, and techniques.

Temp.—Temperaments: In the exhibited profiles, temperaments are given by the symbols 1, 2, 3, 4, 5, 7, 8, 9, 0, and Y. These occupational situations to which the worker must adjust are defined as:

1—Situations involving a variety of duties often characterized by frequent change.

2—Situations involving repetitive or short cycle operations carried out according to set procedures or sequences.

3—Situations involving doing things only under specific instruction, allowing little or no room for independent action or judgment in working out job problems.

4—Situations involving the direction, control, and planning of an entire activity or the activities of others.

5—Situations involving the necessity of dealing with people in actual job duties beyond giving and receiving instructions.

7—Situations involving influencing people in their opinions, attitudes, or judgments about ideas or things.

8—Situations involving performing adequately under stress when confronted with the critical or unexpected or when taking risks.

9—Situations involving the evaluation (arriving at generalizations, judgments, or decisions) of information against sensory or judgmental criteria.

0—Situations involving the evaluation (arriving at generalizations, judgments, or decisions) of information against measurable or verifiable criteria.

Y—Situations involving the precise attainment of set limits, tolerances, or standards.

Phys. Dem. or Cap.—Physical Demands or Capacities: The physical demands or capacities symbols in the exhibited profiles are S, L, 3, 4, 5, and 6. These are defined as:

L—Light Work: Lifting 20 pounds maximum, with frequent lifting and/or carrying of objects up to 10 pounds. Even though the actual weight lifted may be only negligible, a job is considered to be in this category when it requires walking or standing to a significant degree, or when it involves sitting most of the time, with a degree of pushing and pulling of arm and/or leg control.

S—Sedentary Work: Lifting 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers, or small tools. Although a sedentary job is defined as one which involves sitting, a certain amount of walking and standing is often necessary to carry out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.

3—Stooping, Kneeling, Crouching, and/or Crawling:

(1) Stooping—Bending the body downward and forward by bending the spine at the waist.

(2) Kneeling—Bending the legs at the knees to come to rest on the knee or knees.

(3) Crouching—Bending the body downward and forward by bending the legs and spine.

(4) Crawling—Moving about on the hands and knees or hands and feet.

4—Reaching, Handling, Fingering, and/or Feeling:

(1) Reaching—Extending the hands and arms in any direction.

(2) Handling—Seizing, holding, grasping, turning, or otherwise working with the hand(s). (Fingering is not involved.)

(3) Fingering—Picking, pinching, or otherwise working with the fingers primarily, rather than with the whole hand or arm as in handling.

(4) Feeling—Perceiving such attributes of objects and materials as size, shape, temperature, or texture, by means of receptors in the skin, particularly those of the fingertips.

5—Talking and/or Hearing:

(1) Talking—Expressing or exchanging ideas by means of the spoken word.

(2) Hearing—Perceiving the nature of sounds by ear.

6—Seeing: Obtaining impressions through the eyes of shape, size, distance, motion, color, or other characteristics of objects. The major visual functions are:

(1) Acuity, far—Clarity of vision at 20 feet or more.
Acuity, near—Clarity of vision at 20 inches or less.

(2) Depth perception (three-dimensional vision)—The ability to judge distances and space relationships so as to see objects where and as they really are.

(3) Field of vision—The area that can be seen up and down or to the right or left while the eyes are fixed on a given point.

(4) Accommodation—The adjustment of the lens of the eye to bring an object into sharp focus. This item is especially important when doing near-point work at varying distances from the eye.

(5) Color vision—The ability to identify and distinguish colors.

Related Classifications. The related classifications section of the worker trait group display identifies other worker trait groups that have something in common with the group examined and also serves as a reference to the D.O.T. user. A careful examination of these related classifications will reveal which characteristics, skills, and functions are common to all.

ADDITIONAL COMMENTS ABOUT THE D.O.T.

The D.O.T. serves as a useful springboard for the occupational activities analysis necessary to the development of curriculums. When information contained in the worker trait group display, including the qualifications profile, is examined, a generalized pattern emerges for the particular job under consideration. This is probably a result of the blending of the all-inclusive terminology employed by the D.O.T.

A more accurate delineation of skills, functions, duties, and responsibilities required by each job in this guide, in terms of employability standards to be achieved and training content, is necessary to bring particular jobs into proper focus. As a result, a consensus of observations, descriptions, and prerequisites of the covered jobs was obtained from the contributing specialists and consultants.

It is recognized that some teachers, administrators, and counselors may take issue with some of the coding in the Data, Things, and People hierarchies and also with the details of the qualifications profile as set forth in the D.O.T.

There may be varying viewpoints regarding the interests, abilities, aptitudes, and temperaments (and the level of each) required for particular jobs. Workers in any occupation will exhibit a wide range of abilities, temperaments, and interests. Exact matching of these qualities with individuals will pose serious selection, training, and employment problems. Merely because a worker has basic aptitudes which are thought to be directly related to job performance does not insure success either in training or employment. However, failure to exhibit any of the well-correlated aptitudes for an occupation will often result in failure. Teachers, counselors, and others are referred to the section on guidance in this guide for further information regarding the selection process and testing.

The Occupation and Training Analyses section of this guide should also be consulted. This section contains a short analysis of each job's activities in terms of required skills, functional knowledge and duties, and environmental knowledge.

The D.O.T. was used, as much as possible, to determine common elements of skills and functional requirements for each of the pertinent jobs listed in its three-digit occupational grouping. Predicated on these findings, a general pattern of training was developed for basic skills and some of the functional duties required for each job. It became obvious that the course units included in the basic training had to be tailored and that specialized units would have to be evaluated carefully to determine their contribution to each particular job. Additional consideration was also given to the purposes that each curriculum was to serve. Information concerning these considerations is set forth in the section *About the Curriculum.*

The D.O.T. was also used, in terms of aptitudes, interests, and temperaments defined therein, to establish fundamental occupational prerequisites. Skills and knowledges gained from work experience, equivalent to the suggested training, are acceptable in lieu of the training. These knowledges and skills should be assessed carefully by counselors and teachers before enrolling a trainee in particular courses of study.

JOB DESCRIPTIONS, OCCUPATIONAL PREREQUISITES, AND SUGGESTED TRAINING

Many jobs in an occupational field can be clustered on the basis of worker qualifications in terms of personal characteristics, aptitudes, and abilities, and training needed to meet the demands of the jobs. This section is subdivided to present job definitions, occupational prerequisites, and suggested training so that the user may quickly refer to other sections in the guide to find supplemental required information. The subdivisions are as follows:

1. *Occupational Level.* Job Levels I, II, and III are defined in the *About the Curriculum* section of this guide. In that section, all job titles are listed at a particular level.

2. *Occupational Prerequisites.* As a general rule, jobs in each level are grouped under a pertinent "Worker Traits Arrangement of Titles and Codes" exhibit. The particular "Worker Traits Arrangement of Titles and Codes," taken from the D.O.T., is exhibited in the section, *About the Dictionary of Occupational Titles.* Reference is made to the Worker Requirements and Qualifications Profile for a particular "Worker Traits Arrangement of Titles and Codes" to detail the required worker characteristics. In addition, occasional amendments to the information found in various exhibits may also appear as notes under the job definition. Thus, the occupational prerequisites may be a combination of information from the D.O.T. and generally used employer selection standards. Individual employers will vary in the importance they attach to particular worker characteristics and the ways in which they may judge these characteristics. Teachers and counselors should be especially alert to these aspects and should evaluate trainees using criteria for the characteristics similar to those used by employers.

3. *Job Title and D.O.T. Number.* Job titles and D.O.T. numbers are centered on the page under each Occupational Prerequisite subsection. Alternate titles for a job are included under the job definition.

4. *Job Definition (D.O.T.).* The job descriptions are taken from the D.O.T. definitions. The user of the guide is cautioned to regard these job descriptions as generalized and not definitive. Employers may specify, in much greater detail, the tasks and duties expected to be performed in a particular position. These details will vary according to the size and composition of the work staff; the nature of work done; the location of the office, plant, agency, or branch; the availability of skills in the labor market; and the individual employer's philosophy.

The word "may" in the job descriptions signifies that the duty following it may be required by some employers or may be performed only on occasion. In any event, the duty following the word "may" will be subordinate to other duties in the job with respect to the time and effort given to it by the worker.

5. *Suggested Training.* A synopsis of the training suggested for developing competencies for employment or for further development on the job is shown. Included in the suggested training is the relevant work experience project phase. The suggested training data refer to the basic program and the specialized and administrative training units suggested for study. Some of the suggested training is optional and is explained in the *Curriculum Synopses* section. The guide user should refer to the program suggested for the job in the *Curriculum Synopses* section for typical arrangements of courses.

LEVEL I JOBS

Occupational Prerequisites

The worker in the job defined below should have the characteristics described in the Worker Requirements and Qualifications Profile included in exhibit I, *Administration, .118, .168.*

Bank Cashier (banking)—186.168

Job Definition (D.O.T.)

Directs bank's monetary programs, transactions, and security measures in accordance with banking principle and legislation: Coordinates program activities and evaluates operating practices to insure

efficient operations. Oversees receipt, disbursement, and expenditure of money. Signs documents approving or effecting monetary transactions. Directs safekeeping and control of assets and securities. Approves loans and participates as member of committees concerned with loaning and customer service functions. Directs accounting for assets, and maintains specified legal cash reserve. Reviews financial and operating statements, and presents reports and recommendations to bank officials or board committees. Maintains financial and community business affiliations to broaden bank's services and develop new business. When supervising stock transactions may be designated as STOCK CASHIER.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Work Simplification	30
(3) Public Speaking	40
(4) Effective Internal Communications	30
(5) Public and Community Relations	30
(6) Business Contract Law	30
(7) Business Economics	80
(8) Business Correspondence	30
(9) Records Management	20
(10) Business Reports	15
(11) Effective Interpersonal Relations	40
(12) Business Data and Statistics	30
(13) Principles of Effective Supervision	60
(14) Employee Appraisal and Counseling	60
(15) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit the characteristics described in the Worker Requirements and Qualifications Profile included in exhibit II, *Supervisory Work (Clerical, Sales, and Related Activities), .138.*

Manager, Safe Deposits (banking)—186.138

Job Definition (D.O.T.)

Supervises and coordinates activities of workers engaged in renting and maintaining safe-deposit boxes: Opens and closes vault and records time of opening and closing in logbook. Turns controls to set vault clock for re-opening. Authorizes forcing, servicing, and repair of safe-deposit box locks. Approves or disapproves rentals and requests for admittance to safe-deposit boxes in accordance with bank regulations. Compiles statistical and tax reports. Keeps departmental records. Trains new employees and assigns them to duties.

Suggested Training

	Hours
(1) Performance Standards	30
(2) Principles of Effective Supervision	60
(3) Basic Training Methods and Practices	70
(4) Employee Appraisal and Counseling	60
(5) Records Management	20
(6) Effective Interpersonal Relations	40
(7) Business Data and Statistics	30
(8) Relevant Work Experience Projects	--

Occupational Prerequisites

The workers in the jobs defined below should exhibit the characteristics described in the Worker Requirements and Qualifications Profile included in exhibit III, *Managerial Work, .168.*

Chief Clerk (any ind.)—169.168

Job Definition (D.O.T.)

Manager, general office; manager, general service; office supervisor. Supervises and coordinates activities of clerical staff of an establishment: Prepares work schedules and expedites workflow. Reviews work performed, prepares employee ratings, and conducts employee benefit and insurance programs. Computes and compiles data and prepares records and reports. Directs preparation of payrolls. Estimates office inventory needs and purchases supplies. Studies and standardizes procedures to improve efficiency of department. Devises required forms. Coordinates work with operations of other departments. Estimates budget needs.

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Induction and Orientation of Employees	30
(3) Performance Standards	30
(4) Principles of Effective Supervision	60
(5) Basic Training Methods and Practices	70
(6) Problem-Solving Techniques	30
(7) Employee Appraisal and Counseling	60
(8) Work Simplification	30
(9) Fundamentals of Interviewing	30
(10) Effective Internal Communications	30
(11) Payroll and Employee Tax Records	10

(12)	Business Correspondence	30
(13)	Procedures Writing	15
(14)	Forms Design	20
(15)	Records Management	20
(16)	Business Reports	15
(17)	Inventory Control Practices	30
(18)	Effective Interpersonal Relations	40
(19)	Introduction to Business Data Processing	30
(20)	Business Data and Statistics	30
(21)	Wage and Salary Administration	60
(22)	Relevant Work Experience Projects	--

Manager, Credit and Collection (any ind.)—168.168

Job Definition (D.O.T.)

Accounts supervisor; credit man; manager, credit investigations. Manages credit and collection department of commercial house, department store, hotel, or similar establishment: Investigates financial standing and reputation of prospective customers applying for credit. Reviews and evaluates results of investigations to reject credit application or to establish credit limitations on customer accounts. Supervises collection of bad accounts and worthless checks. Makes up collection notes to customers. Keeps records of collections. May submit delinquent accounts to agency or attorney for collection.

Suggested Training

		Hours
(1)	Performance Standards	30
(2)	Principles of Effective Supervision	60
(3)	Problem-Solving Techniques	30
(4)	Employee Appraisal and Counseling	60
(5)	Fundamentals of Interviewing	30
(6)	Business Correspondence	30
(7)	Business Reports	15
(8)	Effective Interpersonal Relations	40
(9)	Introduction to Business Data Processing	30
(10)	Records Management	20
(11)	Basic Training Methods and Practices	70
(12)	Relevant Work Experience Projects	--

Supervisor, Credit Union (finan. inst.)—186.168

Job Definition (D.O.T.)

Manages credit union to maintain control and accountability of company credit union resources: Disburses funds and signs checks, notes, and other obligations in name of credit union. Reviews credit applications and makes loan recommendations to credit committee. Initiates payroll deductions authorized by employees, collects funds due, and makes bank deposits. Supervises workers engaged in collection of delinquent loan payments and possession of property pledged by borrowers as security, and directs preparation of periodic financial statements. Assists government representatives in regular audit of credit union records.

Suggested Training

		Hours
(1)	Performance Standards	30
(2)	Principles of Effective Supervision	60
(3)	Problem-Solving Techniques	30
(4)	Employee Appraisal and Counseling	60
(5)	Fundamentals of Interviewing	30
(6)	Effective Internal Communications	30
(7)	Payroll and Employee Tax Records	10
(8)	Business Correspondence	30
(9)	Business Reports	15
(10)	Effective Interpersonal Relations	40
(11)	Business Data and Statistics	30
(12)	Records Management	20
(13)	Basic Training Methods and Practices	70
(14)	Relevant Work Experience Projects	--

Manager, Insurance Office (insurance)—186.168

Job Definition (D.O.T.)

District agent; manager, agency. Supervises and coordinates activities of branch or district insurance office personnel: Recruits and trains sales and other personnel. Interprets and implements company policy. Explains provisions of insurance contracts to sales personnel and assigns sales leads. Consults with company officials to plan methods of increasing sales. Assists sales personnel in closing difficult sales. Reviews sales reports to insure that sales personnel have achieved assigned quota or to reconcile earned commissions with commission advances. Analyzes production reports to determine progress of agency.

Suggested Training

		Hours
(1)	Records Management	20
(2)	Induction and Orientation of Employees	30
(3)	Principles of Effective Supervision	60
(4)	Basic Training Methods and Practices	70
(5)	Employee Appraisal and Counseling	60
(6)	Fundamentals of Interviewing	30
(7)	Public Speaking	40
(8)	Effective Internal Communications	30

(9)	Public and Community Relations	30
(10)	Corporate Insurance Practice	30
(11)	Business Correspondence	30
(12)	Business Principles and Organization	30
(13)	Business Reports	15
(14)	Effective Interpersonal Relations	40
(15)	Techniques of Marketing and Advertising (Elective)	40
(16)	Problem-Solving Techniques	30
(17)	Payroll and Employee Tax Records	10
(18)	Performance Standards	30
(19)	Business Data and Statistics	30
(20)	Relevant Work Experience Projects	--

Manager, Trainee (any ind.)—189.168

Job Definition (D.O.T.)

Staff assistant. Performs assigned duties in business organization, depending on nature of business, to gain knowledge and experience for promotion to management positions: Participates in work of such departments of business as credit, sales, engineering, advertising, accounting, traffic, warehousing, or personnel, performing various duties under close supervision. Observes techniques utilized by experienced workers, learns line and staff functions of each department, and becomes familiar with management policies and viewpoints as they affect each phase of business operations. May rotate assignments among all departments or among departments having allied functions, or may be assigned to single department.

Suggested Training (also applies to JUNIOR EXECUTIVE)

		Hours
(1)	Job Descriptions, Specifications, and Evaluation	60
(2)	Problem-Solving Techniques	30
(3)	Work Simplification	30
(4)	Effective Internal Communications	30
(5)	Business Contract Law	30
(6)	Business Economics	80
(7)	Payroll and Employee Tax Records	10
(8)	Business Correspondence	30
(9)	Business Principles and Organization	30
(10)	Procedures Writing	15
(11)	Records Management	20
(12)	Business Reports	15
(13)	Effective Interpersonal Relations	40
(14)	Business Data and Statistics	30
(15)	Basic Training Methods and Practices	70
(16)	Principles of Effective Supervision	60
(17)	Relevant Work Experience Projects	--

Junior Executive (any ind.)—189.168

Job Definition (D.O.T.)

Junior executive trainee. Acts in junior supervisory capacities, such as that of assistant department manager of organization, to learn company policies, departmental functions, jobs, and personnel functions with a view toward gaining knowledge of all phases of business. Participates in on-the-job training and classroom discussions. This job is definitely promotional with unlimited possibilities, principal requirements being based on personality, ambition, and initiative, rather than knowledge and experience in particular business.

Suggested Training

See MANAGER, TRAINEE.

Manager, Office (any ind.)—169.168

Job Definition (D.O.T.)

Supervises and coordinates activities of personnel in centralized clerical functions of organization: Organizes office operations, such as typing, bookkeeping, preparation of payrolls, and other clerical services. Maintains efficient flow of work by evaluating office production and revising procedures accordingly. Directs supervisors responsible for other clerical and administration functions. Standardizes office procedures and initiates policy and procedure changes. Directs department operations to prepare and retain records, files, and reports in accordance with standards. Plans office layouts, requisitions office supplies and equipment, and initiates cost reduction programs. Reviews clerical and personnel records to insure their completeness, accuracy, and timeliness. Coordinates activities with those of other departments. Prepares activities reports for guidance of management. May participate in budget preparation. May perform clerical duties, such as bookkeeping or making up payroll.

Suggested Training

		Hours
(1)	Job Descriptions, Specifications, and Evaluation	60
(2)	Induction and Orientation of Employees	30
(3)	Performance Standards	30
(4)	Principles of Effective Supervision	60
(5)	Basic Training Methods and Practices	70
(6)	Problem Solving Techniques	30
(7)	Employee Appraisal and Counseling	60

(8) Work Simplification	30
(9) Fundamentals of Interviewing	30
(10) Effective Internal Communications	30
(11) Budgeting	40
(12) Wage and Salary Administration	60
(13) Payroll and Employee Tax Records	10
(14) Business Correspondence	30
(15) Procedures Writing	15
(16) Forms Design	20
(17) Records Management	20
(18) Business Reports	15
(19) Effective Interpersonal Relations	40
(20) Introduction to Business Data Processing	30
(21) Business Principles and Organization	30
(22) Relevant Work Experience Projects	--

Occupational Prerequisites

The workers in the jobs defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit IV, *Consultative and Business Services, .168, .268.*

Clerical Technician (profess. & kin.)—161.268

Job Definition (D.O.T.)

Methods man. Studies clerical and statistical methods in commercial or industrial establishments to develop improved and standardized procedures: Consults supervisors and clerical workers to ascertain functions of offices or sections, methods used, and personnel requirements. Prepares reports on procedures and tasks of individual workers. Makes recommendations for improvements by introduction of new forms, modifications of existing procedures, or some other method. May gather data and prepare statistical reports for promotional and incentive purposes [STATISTICAL CLERK (clerical)]. May write training manuals and conduct training conferences in new procedures. May write job descriptions and specifications (JOB ANALYST).

Suggested Training

	Hours
(1) Work Simplification	30
(2) Job Descriptions, Specifications, and Evaluation	60
(3) Basic Training Methods and Practices	70
(4) Problem-Solving Techniques	30
(5) Fundamentals of Interviewing	30
(6) Procedures Writing	15
(7) Forms Design	20
(8) Records Management	20
(9) Business Reports	15
(10) Time and Motion Economy	30
(11) Effective Interpersonal Relations	40
(12) Introduction to Business Data Processing	30
(13) Business Data and Statistics	30
(14) Effective Internal Communications	30
(15) Relevant Work Experience Projects	--

File Service Worker (bus. ser.)—161.268

Job Definition (D.O.T.)

Installs and reorganizes file systems for business establishments, and gives instructions to file clerks in new procedures: Analyzes records of business establishment to determine needs and discusses findings with management. Recommends or modifies filing system of company represented to serve needs of and simplify record keeping of business establishment. May supervise, train, and coordinate activities of workers engaged in transferring data to and keeping records in accordance with new system.

Suggested Training

	Hours
(1) Performance Standards	30
(2) Principles of Effective Supervision	60
(3) Basic Training Methods and Practices	70
(4) Problem Solving Techniques	30
(5) Work Simplification	30
(6) Fundamentals of Interviewing	30
(7) Indexing and Filing Practices	30
(8) Procedures Writing	15
(9) Forms Design	20
(10) Records Management	20
(11) Time and Motion Economy	30
(12) Effective Interpersonal Relations	40
(13) Introduction to Business Data Processing	30
(14) Relevant Work Experience Projects	--

Loan Counselor (banking)—169.268

Job Definition (D.O.T.)

Loan-servicing officer. Analyzes loan contracts and attempts to obtain payment of overdue installments: Studies record of delinquent account and contacts borrower to discuss payments due. Analyzes financial problems of borrower and adjusts loan agreement to restore loan to good standing. Receives and records payments. Prepares reports of delinquent accounts that cannot be collected. Answers loan inquiries concerning loan balance, taxes, and penalties. May represent company in legal proceedings.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Fundamentals of Interviewing	30
(3) Effective Internal Communications	30
(4) Business Contract Law	30
(5) Business Correspondence	30
(6) Records Management	20
(7) Effective Interpersonal Relations	40
(8) Business Investments	15
(9) Corporate Financial Planning and Control	40
(10) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit V, *Accounting, Auditing, and Related Work, .188, .288.*

Purchase-Price Analyst (profess. & kin.)—162.188

Job Definition (D.O.T.)

Compiles and analyzes statistical data to determine feasibility of buying products and to establish price objectives for contract transactions: Compiles information from periodicals, catalogs, and other sources to keep informed on price trends and manufacturing processes. Obtains data for cost analysis studies by determining manufacturing costs processes. Obtains data for cost analysis studies by determining manufacturing costs within divisions of company. Confers with vendors and analyzes vendor's operations to determine factors that affect prices. Prepares reports, charts, and graphs of findings. Evaluates findings and makes recommendations to purchasing personnel regarding feasibility of manufacturing or buying needed products. May recommend use of alternative parts, materials, or manufacturing methods to reduce costs.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Work Simplification	30
(3) Fundamentals of Interviewing	30
(4) Effective Internal Communications	30
(5) Introduction to Bids and Contracts	15
(6) Business Economics	80
(7) Business Correspondence	30
(8) Business Reports	15
(9) Effective Interpersonal Relations	40
(10) Material Specifications	30
(11) Calculating Costs and Prices	20
(12) Introduction to Business Data Processing	30
(13) Business Data and Statistics	30
(14) Records Management	20
(15) Business Contract Law	30
(16) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit VI, *Title and Contract Search and Analysis and Related Work, .288.*

Title Clerk (petrol. production; petrol. refin.; pipe lines)—162.288

Job Definition (D.O.T.)

Procures testimonial documents required to remove restrictions affecting title of landowners to property and requisitions purchase orders and bank checks to satisfy requirements of contracts and agreements covering lease or purchase of land and gas, oil, and mineral rights: Examines lease, contract, and purchase agreements to assure conformity to specified requirements. Examines abstract to assure complete title-coverage of land described, completeness of land description, and to detect lapses of time in abstract coverage of landowner's title. Prepares correspondence and other records to transmit leases and abstracts. Reviews title opinion to determine nature of testimonial documents needed to meet legal objections and to assure accuracy in terms of trade. Confers with personnel of abstract company, land owners, and LEASEMEN (petrol. production) to explain reasons for and to obtain testimonial documents needed to clear title. Prepares or requests deeds, affidavits, and other documents and transmits them to appropriate persons for execution to meet title requirements. Investigates whether delinquent taxes are due on land involved in agreements and confers or corresponds with landowner to assure payment. Verifies computations of fees, rentals, bonuses, brokerage commissions, and other expenses and prepares records to initiate requests for payment. Prepares purchase data sheet covering each trade for records unit. Answers queries regarding leases and contracts by mail, telephone, or personal discussion. May stop purchase negotiations when litigation or claims adversely affect company interests.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Business Contract Law	30
(3) Business Economics	80
(4) Office Machines—Computing and Duplicating	30
(5) Business Correspondence	30
(6) Records Management	20
(7) Business Reports	15
(8) Effective Interpersonal Relations	40
(9) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit VII, *Classifying, Filing, and Related Work, .388.*

Escrow Officer (profess. & kin.)—169.388

Job Definition (D.O.T.)

Holds in escrow collateral posted to insure fulfillment of contracts and holds legal papers, such as real estate contracts and trust agreements: Prepares escrow agreement. Carries out terms of contract or trust agreement, such as holding money or legal papers, paying off mortgages, or paying sums of designated parties. Files and delivers deeds and other legal papers. May search real estate titles.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Business Contract Law	30
(3) Business Correspondence	30
(4) Records Management	20
(5) Effective Interpersonal Relations	40
(6) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit VIII, *Technical Writing and Related Work, .188, .288.*

Process-Description Writer (any ind.)—012.188

Job Definition (D.O.T.)

Instructions supervisor. Prepares descriptions of work methods and processes to be followed in an industrial establishment: Studies written specifications for finished product, manuals on components, and other technical information to become familiar with production requirements. Observes plant operations and consults supervisory and technical personnel to determine operating procedures. Writes work methods and process descriptions based on findings for use in production operations. May supervise workers engaged in duplication and distribution of descriptions. May edit and standardize process descriptions prepared by foremen or other operating personnel (STANDARD-PRACTICE MAN). Applicants are usually selected on basis of specific training or experience in production operations of industry in which job occurs.

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Performance Standards	30
(3) Principles of Effective Supervision	60
(4) Problem-Solving Techniques	30
(5) Employee Appraisal and Counseling	60
(6) Fundamentals of Interviewing	30
(7) Effective Internal Communications	30
(8) Office Machines—Computing and Duplicating	30
(9) Procedures Writing	15
(10) Time and Motion Economy	30
(11) Effective Interpersonal Relations	40
(12) Work Simplification	30
(13) Relevant Work Experience Projects	--

Occupational Prerequisites

The workers in the jobs defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit IX, *Investigating, Protecting, and Related Work, .168, .268.*

Interviewer and Claims Adjuster (gov. ser.)—169.168

Job Definition (D.O.T.)

Claims representative. Interviews claimants and adjudicates claims of persons seeking benefits provided by Social Security laws: Informs interested persons of filing requirements and benefits provided by Old Age, Survivors, and Disability Insurance laws. Obtains information for processing claims by interviewing applicants and reviewing and verifying documents, such as birth certificates, marriage licenses, divorce decrees, and certifications of disability. Records information on specified forms. Reviews and

interprets State and Federal laws to determine legality of applicant's claim. Prepares reports of findings and determinations.

NOTE: Successful completion of appropriate qualifying tests for Civil Service is required.

Suggested Training

	Hours
(1) Fundamentals of Interviewing	30
(2) Indexing and Filing Practices	30
(3) Effective Interpersonal Relations	40
(4) Relevant Work Experience Projects	--

Vocational Disability Examiner (gov. ser.)—169.168

Job Definition (D.O.T.)

Disability examiner. Adjudicates claims for disability benefits filed under the Federal Social Security Act, on basis of provisions of the act and on pertinent regulations and standards: Analyzes and evaluates medical, psychiatric, vocational, and other evidence submitted by claimant or others, for consistency, validity, and sufficiency. Confers with medical and other consultants to resolve complex problems. Authorizes, when necessary, consultations in the fields of medicine, psychiatry, psychology, and vocational guidance to obtain additional evidence. Interviews employers, relatives, friends, staff members of institutions and social agencies, and others to obtain nonmedical evidence concerning manifestations of the disability, work performance, daily activities, and other pertinent information. Evaluates evidence and determines capacity of claimant to engage in substantial gainful activity. Prepares written report to document case. Assesses vocational rehabilitation potential of claimant for referral to appropriate rehabilitation agency. Reevaluates evidence and procures additional information, when necessary, in cases at the appellate level or in cases requiring investigation of claimant's continuing entitlement to benefits.

NOTE: Successful completion of appropriate qualifying tests for Civil Service is required.

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Problem Solving Techniques	30
(3) Fundamentals of Interviewing	30
(4) Effective Internal Communications	30
(5) Indexing and Filing Practices	30
(6) Effective Interpersonal Relations	40
(7) Records Management	20
(8) Business Correspondence	30
(9) Relevant Work Experience Projects	--

LEVEL II JOBS

Occupational Prerequisites

The workers in the jobs defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit I, *Administration, .118, .168.*

Contract Specialist (gov. ser.)—162.118

Job Definition (D.O.T.)

Negotiates with private concerns to draw up procurement contracts for the Federal government and private concerns: Reviews contract administration, negotiation, termination, and renegotiation. Formulates and coordinates procurement policies and procedures. Determines necessity for amendments or extensions of contracts. Approves or rejects requests for deviations from contract specifications and delivery schedules. Analyzes price proposals, financial reports, and other data to determine reasonableness of prices. May serve as liaison officer to insure fulfillment of obligations by contractors.

NOTE: Successful completion of appropriate qualifying tests for Civil Service is required.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Fundamentals of Interviewing	30
(3) Effective Internal Communications	30
(4) Introduction to Bids and Contracts	15
(5) Business Contract Law	30
(6) Records Management	20
(7) Business Correspondence	30
(8) Effective Interpersonal Relations	40
(9) Calculating Costs and Prices	20
(10) Relevant Work Experience Projects	--

Manager, Branch (any ind.)—183.118

Job Definition (D.O.T.)

Agent; manager, area; manager, division; manager, plant. Directs production, distribution, and marketing operations for branch plant or an assigned territory of industrial organization: Coordinates production, distribution, warehousing, and selling activities in accordance with policies, principles, and procedures established by MANAGER, INDUSTRIAL ORGANIZATION. Confers with customers and industrial

representatives to evaluate and promote possibilities for improved and expanded services in area. Develops plans for efficient machine, manpower, and material utilization. Reviews and alters production costs, quality, and inventory control programs to maintain profitable operation of division. Plans and directs sales program by reviewing competitive position and developing new markets, using sales aids, advertising, promotional programs, and field services. Directs personnel program. Directs preparation of accounting records. Recommends budgets to management. May be designated according to title of area of jurisdiction as MANAGER, DISTRICT; MANAGER, LOCAL; MANAGER, REGIONAL.

Suggested Training

	Hours
(1) Payroll and Employee Tax Records	10
(2) Performance Standards	30
(3) Principles of Effective Supervision	60
(4) Basic Training Methods and Practices	70
(5) Problem Solving Techniques	30
(6) Employee Appraisal and Counseling	60
(7) Work Simplification	30
(8) Fundamentals of Interviewing	30
(9) Public Speaking	40
(10) Effective Internal Communications	30
(11) Public and Community Relations	30
(12) Budgeting	40
(13) Developing Organizational and Operational Objectives	30
(14) Introduction to Bids and Contracts	15
(15) Organizational and Manpower Planning	60
(16) Business Contract Law	30
(17) Business Forecasting	20
(18) Wage and Salary Administration	60
(19) Business Economics	80
(20) Union Contract Administration	60
(21) Business Correspondence	30
(22) Business Principles and Organization	30
(23) Procedures Writing	15
(24) Business Reports	15
(25) Production Control Boards and Charts	60
(26) Inventory Control Practices	30
(27) Traffic Management	80
(28) Production Reports, Estimates, and Schedules	30
(29) Effective Interpersonal Relations	40
(30) Techniques of Marketing and Advertising	40
(31) Calculating Costs and Prices	20
(32) Business Data and Statistics	30
(33) Records Management	20
(34) Induction and Orientation of Employees	30
(35) Job Descriptions, Specifications, and Evaluation	60
(36) Relevant Work Experience Projects	--

Trust Officer (banking)—186.118

Job Definition (D.O.T.)

Trust administrator. Administers private, corporate, and probate trusts: Examines or drafts trust agreement to insure compliance with legal requirements and terms creating trust. Locates, inventories, and evaluates assets of probated accounts. Directs realization of assets, liquidation of liabilities, payment of bills, preparation of Federal and State tax returns, and collection of earnings. May invest trust funds. May administer escrows. May act as transfer agent in securities trust transactions.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Effective Internal Communications	30
(3) Corporate Financial Planning and Control	40
(4) Business Contract Law	30
(5) Records Management	20
(6) Business Economics	80
(7) Business Correspondence	30
(8) Business Reports	15
(9) Effective Interpersonal Relations	40
(10) Business Investments	15
(11) Relevant Work Experience Projects	--

Occupational Prerequisites

The workers in the jobs defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit III, *Managerial Work, .168.*

Account Executive (profess. & kin.)—164.168

Job Definition (D.O.T.)

Account representative. Plans and directs advertising activities of individual accounts of an advertising agency: Plans advertising program in accordance with client's objectives and budget limitations. Determines advertising medium to be used and establishes advertising budget. Consults with art, copy, and media representatives to determine media to be used and to obtain cost estimate of advertising pro-

gram. Submits estimate to client for approval. Coordinates activities of layout, copy, media production, and traffic department.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Fundamentals of Interviewing	30
(3) Public Speaking	40
(4) Effective Internal Communications	30
(5) Public and Community Relations	30
(6) Budgeting	40
(7) Effective Interpersonal Relations	40
(8) Techniques of Marketing and Advertising	40
(9) Business Correspondence	30
(10) Relevant Work Experience Projects	--

Administrative Assistant (any ind.)—169.168

Job Definition (D.O.T.)

Administrative analyst; administrative officer. Aids executive in staff capacity by coordinating office services, such as personnel, budget preparation and control, housekeeping, records control, and special management studies: Studies management methods in order to improve workflow, simplify reporting procedures, or implement cost reductions. Analyze unit operating practices, such as recordkeeping systems, forms control, office layout, suggestion systems, personnel requirements, and performance standards, to create new systems or revise established procedures. Analyzes jobs to de-limit position responsibilities for use in wage-and-salary adjustments, promotions, and evaluation of workflow. Studies methods of improving work measurements or performance standards. Coordinates collection and preparation of operating reports, such as time-and-attendance records, terminations, new hires, transfers, budget expenditures, and statistical records of performance data. Prepares reports including conclusions and recommendations for solution of administrative problems. Issues and interprets operating policies. Reviews and answers correspondence. May assist in preparation of budget needs and annual reports of organization. May interview job applicants, conduct orientation of new employees, and plan training programs. May direct services, such as maintenance, repair, supplies, mail, and files.

Suggested Training

	Hours
(1) Procedures Writing	15
(2) Job Descriptions, Specifications, and Evaluation	60
(3) Induction and Orientation of Employees	30
(4) Basic Training Methods and Practices	70
(5) Problem Solving Techniques	30
(6) Work Simplification	30
(7) Personnel Policies	40
(8) Fundamentals of Interviewing	30
(9) Effective Internal Communications	30
(10) Budgeting	40
(11) Developing Organizational and Operational Objectives	30
(12) Introduction to Bids and Contracts	15
(13) Organizational and Manpower Planning	60
(14) Business Contract Law	30
(15) Business Forecasting	20
(16) Wage and Salary Administration	60
(17) Business Economics	80
(18) Principles of Effective Supervision	60
(19) Business Correspondence	30
(20) Business Data and Statistics	30
(21) Effective Interpersonal Relations	40
(22) Performance Standards	30
(23) Payroll and Employee Tax Records	10
(24) Records Management	20
(25) Business Reports	15
(26) Business Principles and Organization	30
(27) Relevant Work Experience Projects	--

General Foreman (any ind.)—183.168

Job Definition (D.O.T.)

Department foreman; division foreman; manager, production department; process supervisor; production foreman; production supervisor; superintendent, division. Supervises foremen and coordinates activities of one or more production subdivisions of an industrial establishment applying knowledge of production methods, processes, machines and equipment, plant layout, and production capacities of each department: Reviews production procedures and time and cost estimates for production unit, and hires or requisitions personnel to meet production schedules. Interprets company policies to subordinate supervisors. Establishes or adjusts work procedures based on review of factors, such as specifications, efficiency studies, production figures, and worker reactions. Prepares reports for administrative personnel relating to factors such as production and labor and material costs. Recommends measures designed to improve production methods, equipment performance, and quality of product, such as changes in working conditions and modifications of machines and equipment. May

initiate personnel actions, such as promotions, transfers, discharges, and disciplinary measures. May confer with workers or their representatives to resolve grievances and reports unsettled grievances to PRODUCTION SUPERINTENDENT or other administrative personnel. Typical designations are FOREMAN, INSPECTION AND TESTING (clock & watch); GENERAL YARDMASTER (r.r. trans.); GENERAL FOREMAN, BLAST FURNACE (iron & steel); MANAGER, GRAPHIC ARTS (paper goods); SUPERINTENDENT, ALLOY DEPARTMENT (nonfer. metal alloys).

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Performance Standards	30
(3) Principles of Effective Supervision	60
(4) Problem Solving Techniques	30
(5) Employee Appraisal and Counseling	60
(6) Work Simplification	30
(7) Fundamentals of Interviewing	30
(8) Effective Internal Communications	30
(9) Budgeting	40
(10) Business Economics	80
(11) Union Contract Administration	60
(12) Business Principles and Organization	30
(13) Production Control Boards and Charts	60
(14) Inventory Control Practices	30
(15) Production Reports, Estimates, and Schedules	30
(16) Effective Interpersonal Relations	40
(17) Material Specifications	30
(18) Quality Control Practices	20
(19) Time and Motion Economy	30
(20) Wage and Salary Administration	60
(21) Records Management	20
(22) Business Data and Statistics	30
(23) Business Reports	15
(24) Basic Training Methods and Practices	70
(25) Relevant Work Experience Projects	--

Operations Officer (banking)—186.168

Job Definition (D.O.T.)

Coordinates activities of personnel engaged in internal operations of branch bank or department, under direction of VICE PRESIDENT, BANK: Audits accounts, records of proof, and certifications to insure that standard practices are followed. Compiles periodic and special reports covering functions of branch. Interviews and assists in selecting new employees. Directs employee training to improve efficiency and to develop standard procedural practices. Counts and verifies incoming cash shipments and maintains control of bank's supply of money according to daily needs and legal requirements. Conducts staff meetings or confers with supervisors to discuss operational problems or procedural changes. May be designated according to department as OPERATIONS OFFICER, PERSONNEL; OPERATIONS OFFICER, TRUST.

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Induction and Orientation of Employees	30
(3) Performance Standards	30
(4) Principles of Effective Supervision	60
(5) Basic Training Methods and Practices	70
(6) Problem Solving Techniques	30
(7) Employee Appraisal and Counseling	60
(8) Work Simplification	30
(9) Fundamentals of Interviewing	30
(10) Effective Internal Communications	30
(11) Wage and Salary Administration	60
(12) Business Correspondence	30
(13) Records Management	20
(14) Business Reports	15
(15) Effective Interpersonal Relations	40
(16) Relevant Work Experience Projects	--

Supervisor, Procurement Services (any ind.)—162.168

Job Definition (D.O.T.)

Supervisor, material control. Coordinates activities of and supervises personnel engaged in purchasing and distributing raw materials, equipment, machinery, and supplies in industrial plant, public utility, or other organization: Prepares instructions regarding purchasing systems and procedures. Prepares and issues purchase orders and change notices to PURCHASING AGENTS. Analyzes market and delivery conditions to determine present and future material availability and prepares market analysis reports. Reviews purchase order claims and contracts for conformance to company policy. Develops and installs clerical and office procedures and practices, and studies work flow, sequence of operations, and office arrangement to determine expediency of installing new or improved office machines. Arranges for disposal of surplus materials.

Suggested Training

	Hours
(1) Performance Standards	30
(2) Principles of Effective Supervision	60
(3) Problem Solving Techniques	30
(4) Employee Appraisal and Counseling	60
(5) Work Simplification	30
(6) Fundamentals of Interviewing	30
(7) Effective Internal Communications	30
(8) Introduction to Bids and Contracts	15
(9) Business Contract Law	30
(10) Business Forecasting	20
(11) Business Economics	80
(12) Business Correspondence	30
(13) Procedures Writing	15
(14) Forms Design	20
(15) Records Management	20
(16) Inventory Control Practices	30
(17) Production Reports, Estimates, and Schedules	30
(18) Effective Interpersonal Relations	40
(19) Material Specifications	30
(20) Introduction to Business Data Processing	30
(21) Business Data and Statistics	30
(22) Business Reports	15
(23) Basic Training Methods and Practices (elective)	70
(24) Relevant Work Experience Projects	--

Property-Disposal Officer (gov. ser.)—169.168

Job Definition (D.O.T.)

Redistribution-and-marketing officer; surplus-property disposal agent. Disposes of surplus government property, other than real property, from knowledge of merchandising practices: Inspects property to ascertain condition and estimate market value. Investigates market conditions and facilities to determine time, place, type of sale, and whether items should be sold individually or in lots. Prepares advertising material and selects media for its release. Assigns and directs activities of sales personnel. Determines method of property display and sets prices of items to be sold in conformity with value and market. Advises government agencies or firms operating under government contract of salvage possibilities. Recommends destruction or abandonment of property not deemed possible or practical to sell or salvage.

NOTE: Successful completion of appropriate qualifying tests for Civil Service is required.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Employee Appraisal and Counseling	60
(3) Effective Internal Communications	30
(4) Public and Community Relations	30
(5) Introduction to Bids and Contracts	15
(6) Business Contract Law	30
(7) Business Correspondence	30
(8) Records Management	20
(9) Effective Interpersonal Relations	40
(10) Material Specifications	30
(11) Techniques of Marketing and Advertising	40
(12) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit V, *Accounting, Auditing, and Related Work, .188, .288.*

Credit Analyst, Chief (banking)—160.288

Job Definition (D.O.T.)

Senior credit analyst. Analyzes fiscal data, such as financial statements, to develop, write, and update credit information used to review bank's credit relationship with customer: Condenses balance sheet and other figures from financial statements submitted by personal, partnership, or corporate customers and transcribes them onto specified report forms. Writes credit reports on customers, presenting such data as comparative balance sheet; operating, depository and borrowing figures; summary of net worth and capital stock; and financial history of customer. May specialize in specific industry as leather, textile, or food. May write letters to answer credit inquiries. May perform outside investigation involving search of public records.

Suggested Training

	Hours
(1) Problem Solving Techniques	30
(2) Fundamentals of Interviewing	30
(3) Effective Internal Communications	30
(4) Public and Community Relations	30
(5) Corporate Financial Planning and Control	40
(6) Business Contract Law	30
(7) Business Economics	80
(8) Use of Consultants	10

(9)	Business Correspondence	30
(10)	Business Reports	15
(11)	Effective Interpersonal Relations	40
(12)	Records Management	20
(13)	Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit IX, *Investigating, Protecting, and Related Work, .168, .268.*

Examiner, Tariff and Schedules (gov. ser.)—169.168

Job Definition (D.O.T.)

Evaluates data supplied by transportation companies, labor unions, and other interested parties to facilitate regulation of schedules and setting of rates for transportation of merchandise and passengers by common carrier: Reviews published tariff schedules, earnings figures supplied by companies, text of previous official rulings, requests for rate adjustments from shippers' organizations, and similar data to determine whether rate inequities exist. Confers with carriers' representatives, labor leaders, and other interested parties to develop data for recommending rate and schedule adjustments. Corresponds with carriers, shippers, and other groups to request data or to supply information relative to schedules or tariff regulations. Makes informal interpretations in cases of disputes between passenger or shipper and carrier. Prepares memoranda and recommendations for action by commission in adjusting tariffs, schedules, and regulations applying to carriers.

NOTE: Successful completion of appropriate qualifying tests for Civil Service is required.

Suggested Training

		Hours
(1)	Problem Solving Techniques	30
(2)	Fundamentals of Interviewing	30
(3)	Effective Internal Communications	30
(4)	Shipping Regulations and Procedures	30
(5)	Traffic Management	80
(6)	Effective Interpersonal Relations	40
(7)	Business Correspondence	30
(8)	Records Management	20
(9)	Business Reports	15
(10)	Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit X, *Purchase and Sales Work, .158, .168.*

Purchasing Agent (any ind.)—162.158

Job Definition (D.O.T.)

Buyer; director, purchasing; manager, purchasing; manager, supply; purchaser. Purchases machinery, equipment, tools, raw materials, parts, services, and supplies necessary for operation of an organization, such as an industrial establishment, public utility, or government unit: Reviews requisitions. Interviews vendors to obtain information relative to product, price, ability of vendor to produce product, service, and delivery date. Reviews proposals from several vendors and negotiates with acceptable bidder for contracts, keeping within budgetary limitations. Keeps records pertaining to items purchased, costs, delivery, product performance, and inventories. Discusses defects of purchased goods with quality control or inspection personnel to determine source of trouble and takes corrective action. May approve bills for payment. May follow up orders to insure specified delivery date [EXPEDITER I (clerical)].

Suggested Training

		Hours
(1)	Problem Solving Techniques	30
(2)	Fundamentals of Interviewing	30
(3)	Effective Internal Communications	30
(4)	Introduction to Bids and Contracts	15
(5)	Business Contract Law	30
(6)	Business Economics	80
(7)	Business Correspondence	30
(8)	Effective Interpersonal Relations	40
(9)	Material Specifications	30
(10)	Quality Control Practices	20
(11)	Calculating Costs and Prices	20
(12)	Records Management	20
(13)	Relevant Work Experience Projects	--

LEVEL III JOBS

NOTE: A core curriculum comprising units applicable to all workers in Level III is shown below. See *Curriculum Synopses* section.

	Units	*Hours*
(1)	Problem Solving Techniques	30
(2)	Effective Internal Communications	30
(3)	Use of Consultants	10
(4)	Business Reports	15

(5)	Effective Interpersonal Relations	40
(6)	Business Correspondence	30

The following course units apply to all Level III jobs, EXCEPT Direct-Mail Specialist:

Units		*Hours*
(7)	Performance Standards	30
(8)	Principles of Effective Supervision	60
(9)	Employee Appraisal and Counseling	60
(10)	Public and Community Relations	30
(11)	Budgeting	40
(12)	Business Contract Law	30
(13)	Business Economics	80
(14)	Records Management	20
(15)	Procedures Writing	15

Course units applicable only to particular jobs are listed under *Suggested Training* for the respective jobs and are suggested in addition to the core curriculum noted above.

Occupational Prerequisites

The workers in the jobs defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit I, *Administration, .118, .168.*

Administrator, Contract and Order (any ind.)—162.118

Job Definition (D.O.T.)

Contract administrator. Directs activities concerned with contracts for purchase of sale of equipment, materials, products, or services: Examines estimates of material, equipment, and production costs, performance requirements, and delivery schedules to insure completeness and accuracy. Prepares bids, process specifications, test and progress reports, and other exhibits that may be required. Reviews bids from other firms for conformity to contract requirements and determines acceptable bids. Negotiates contract with customer or bidder. Requests or approves amendments to or extensions of contracts. Advises planning and production departments of contractual rights and obligations. May compile data for preparing estimates. May coordinate work of sales department with production and shipping department to implement fulfillment of contracts. May act as liaison between company and subcontractors. May direct sales program (MANAGER, SALES).

Suggested Training

		Hours
(1)	Fundamentals of Interviewing	30
(2)	Introduction to Bids and Contracts	15
(3)	Quality Control Practices	20
(4)	Production Control Boards and Charts	60
(5)	Traffic Management	80
(6)	Production Reports, Estimates, and Schedules	30
(7)	Material Specifications	30
(8)	Calculating Costs and Prices	20
(9)	Forms Design	20
(10)	Relevant Work Experience Projects	--

Manager, Industrial Organization (any ind.)—189.118

Job Definition (D.O.T.)

General manager, industrial organization; manager, general; manager, plant; superintendent, industrial organization. Manages industrial organization: Determines and executes administrative policies through subordinate managers. Coordinates activities of departments, such as production, distribution, engineering, maintenance, personnel, and selling. Plans and directs marketing of product to develop new markets and maintain sales volume and competitive position in industry. Plans and develops personnel program to maintain efficient staffing of organization. Reviews and alters programs in areas, such as purchasing, accounting, cost, research and development, and budget allocations, to insure profitable operation of divisions. Represents organization in industry and manufacturing associations to develop acceptance for organization. Typical designations are DIRECTOR, MANUFACTURING (clock & watch); GENERAL MANAGER, PETROLEUM PRODUCTION (petrol. production); GENERAL MANAGER, REFINERY (petrol. refin.); MANAGER, HEMP PROCESSING (cord. & twine); MANAGER, TRANSPORTATION ORGANIZATION (motor trans.; r.r. trans.; water trans.).

Suggested Training

		Hours
(1)	Personnel Policies	40
(2)	Public Speaking	40
(3)	Developing Organizational and Operational Objectives	30
(4)	Organizational and Manpower Planning	60
(5)	Corporate Insurance Practice	30
(6)	Corporate Financial Planning and Control	40

(7) Business Investments	15
(8) Business Forecasting	20
(9) Union Contract Administration	60
(10) Wage and Salary Administration	60
(11) Introduction to Business Data Processing	30
(12) Techniques of Marketing and Advertising	40
(13) Quality Control Practices	20
(14) Production Reports, Estimates, and Schedules	30
(15) Relevant Work Experience Projects	--

Manager, Financial Institution (banking; finan. inst.)—186.118

Job Definition (D.O.T.)

Manages financial institution, such as bank, trust company, or savings and loan associations, performing any combination of following activities: Establishes and maintains relationships with customers, and with business, service, and civic organizations to promote goodwill and develop new business. Supervises accounting and reporting functions and establishes operating policies and procedures. Directs custody and control of assets, records, collateral, and securities held by company. Approves or declines lines of credit, and commercial, real estate, and consumer loans. Directs personnel engaged in trust activities, such as settling estates, administering trusts, and performing agency functions for individuals. May be designated according to type of institution managed as MANAGER, BRANCH BANK (banking); MANAGER, CONSUMER CREDIT; MANAGER, TRUST COMPANY.

Suggested Training

	Hours
(1) Personnel Policies	40
(2) Fundamentals of Interviewing	30
(3) Public Speaking	40
(4) Developing Organizational and Operational Objectives	30
(5) Organizational and Manpower Planning	60
(6) Corporate Insurance Practice	30
(7) Corporate Financial Planning and Control	40
(8) Business Investments	15
(9) Business Forecasting	20
(10) Introduction to Business Data Processing	30
(11) Relevant Work Experience Projects	--

Budget Officer (gov. ser.)—161.118

Job Definition (D.O.T.)

Directs and coordinates formulation and presentation of budgets for controlling funds to implement program objectives of government organization: Directs compilation of experience data based on statistical studies and analysis of past and current years to prepare budgets and to justify funds requested. Correlates appropriations for specific programs with divisional programs, and includes items for emergency funds. Reviews operating budgets periodically to analyze trends affecting budget needs and consults with unit heads to insure adjustments are made in accordance with program changes to facilitate long-term planning. Directs preparation of regular and special budget reports to interpret budget directives and to establish policies for carrying out directives. Makes comparative analyses of operating programs by analyzing costs in relation to services performed for previous fiscal years and submits reports to director with recommendations for budget revisions. Testifies regarding proposed budgets before examing and fund-granting authorities to clarify reports and gain support for estimated budget needs. Administers personnel functions of department, such as training, work scheduling, promotions, transfers, and performance ratings.

NOTE: Successful completion of appropriate qualifying tests for Civil Service may be required.

Suggested Training

	Hours
(1) Job Descriptions, Specifications, and Evaluation	60
(2) Fundamentals of Interviewing	30
(3) Public Speaking	40
(4) Developing Organizational and Operational Objectives	30
(5) Corporate Financial Planning and Control	40
(6) Business Forecasting	20
(7) Introduction to Business Data Processing	30
(8) Business Data and Statistics	30
(9) Personnel Policies	40
(10) Organizational and Manpower Planning	60
(11) Relevant Work Experience Projects	--

Treasurer (any ind.)—161.118

Job Definition (D.O.T.)

Treasury representative. Directs financial planning, procurement, and investment of funds for an organi-

zation: Delegates authority for receipt, disbursement banking, protection, and custody of funds, securities, and financial instruments. Analyzes financial records to forecast future financial position and budget requirements. Evaluates need for procurement of funds and investment of surplus. Advises management on investments and loans for short and long-range financial plans. Prepares financial reports for management. Develops policies and procedures for account collections and extension of credit to customers. Works closely with and may act as CONTROLLER (profess. & kin.). Signs notes of indebtedness as approved by management.

Suggested Training

	Hours
(1) Personnel Policies	40
(2) Public Speaking	40
(3) Developing Organizational and Operational Objectives	30
(4) Organizational and Manpower Planning	60
(5) Corporate Insurance Practice	30
(6) Corporate Financial Planning and Control	40
(7) Business Investments	15
(8) Business Forecasting	20
(9) Business Data and Statistics	30
(10) Introduction to Business Data Processing	30
(11) Relevant Work Experience Projects	--

Occupational Prerequisites

The worker in the job defined below should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in exhibit XI, *Promotion and Publicity, .068.*

Direct-Mail Specialist (any ind.)—164.068

Job Definition (D.O.T.)

Manager, direct-mail advertising. Plans, prepares, and directs direct-mail advertising program. Creates and designs direct-mail advertising, considering budgetary limitations and production deadlines. Assists district, branch, and sales personnel to prepare material for specialized, personalized, or individual direct-mail campaigns, and determines type and source of mailing lists to use. Manages direct-mail portion of company's advertising budget. May direct compilation of mailing lists and devise means of keeping lists up to date.

Suggested Training

	Hours
(1) Fundamentals of Interviewing	30
(2) Office Machines—Computing and Duplicating	30
(3) Forms Design	20
(4) Techniques of Marketing and Advertising	40
(5) Relevant Work Experience Projects	--

NOTE: The following job definitions are included for information purposes only.

Manager (any ind.) II

Job Definition (D.O.T.)

Department head; manager, department; superintendent. A term applied to employees who direct supervisory personnel to attain operational goals of an organization or department as established by management. Classifications are made according to type of work performed or department managed as MANAGER, ADVERTISING; MANAGER, PERSONNEL I (profess. & kin.); or according to types of establishment as MANAGER, FINANCIAL INSTITUTION (banking; finan. inst.); MANAGER, HOTEL (hotel & rest.).

Supervisor (any ind.) (clerical)

Job Definition (D.O.T.)

Chief; group leader; head; leader; principal; section chief; senior. Supervises and coordinates activities of group of workers engaged chiefly in one type of clerical function as bookkeeping, typing, and filing: Determines work procedures. Issues written and oral orders or instructions. Assigns duties to workers and examines work for exactness and neatness. Prepares composite reports from individual reports of subordinates. Maintains harmony among workers. Adjusts errors and complaints. May perform essentially same duties as other workers, or assist subordinates in performing duties. May keep time reports and other personnel records. May employ, train, and discharge workers. Classifications are made according to type of work supervised as SUPERVISOR, COMPUTER OPERATIONS; SUPERVISOR, MESSENGERS (tel. & tel.); TELEGRAPHIC-TYPEWRITER OPERATOR, CHIEF.

Foreman (any ind.)

Job Definition (D.O.T.)

Boss; chief; head; leader; manager; overlooker; overseer; principal; section chief; section leader; senior; supervisor. Supervises and coordinates activities of workers engaged in one or more occupations: Studies production schedules and estimates man-hour requirements for completion of job assignment. Interprets company policies to workers and enforces safety regulations. Interprets specifications, blueprints, and job orders to workers, and assigns duties. Establishes or adjusts work procedures to meet production schedules, using knowledge of capacities of machines and equipment. Recommends measures to improve production methods, equipment performance, and quality of product, and suggests changes in working conditions and use of equipment to increase efficiency of shop, department, or work crew. Analyzes and resolves work problems, or assists workers in solving work problems. Initiates or suggests plans to motivate workers to achieve work goals. Recommends or initiates personnel actions such as promotions, transfers, discharges, and disciplinary measures. May train new workers. Maintains time and production records. May estimate, requisition, and inspect materials. May confer with other FOREMEN to coordinate activities of individual departments. May confer with workers' representatives to resolve grievances. May set up machines and equipment. When supervising workers engaged chiefly in one occupation or craft, is required to be adept in the activities of the workers supervised. When supervising workers engaged in several occupations, is required to possess general knowledge of the activities involved. Classifications are made according to process involved, craft of workers supervised, product manufactured, or according to industry in which work occurs. Typical classifications are CARPENTER FOREMAN (const.); GLAZE FOREMAN (brick & tile); HEAT-TREAT FOREMAN (heat treat.). Feminine title: FORELADY.

OCCUPATIONAL AND TRAINING ANALYSES

Information from the D.O.T., the assembled job descriptions in this guide, and information from the professional contributors were used to identify the component skills, functional duties and requirements, and environmental knowledge needed by workers to perform adequately in the various occupations. This identification served as a guide for preparation of the topical content in the curriculums. Skills, functional requirements, and environmental knowledge were further subdivided into those necessary to a particular position, those that would be helpful in terms of accepting added responsibilities (meeting employer needs and preparing for advancement), and those that are supplemental in helping to enlarge the trainee's perspective of the world of work.

In addition to the occupational and training analyses, this section of the guide discusses relevant work experiences in general, and suggests the schools which may offer basic, specialized, or administrative units of study. This categorization is quite broad and undoubtedly many exceptions exist.

The following tabulations show various skills and functional requirements and typical jobs to which they apply:

Required Skills	*Applicable Jobs*
Supervisory skills: work assignments; delegation and motivation of work force; handling problem employees; performance review, appraisal, and counseling.	Bank Cashier, Chief Clerk, Clerical Technician, Credit and Collection Manager, Credit Union Supervisor, File Service Worker, Insurance Office Manager, Office Manager, Process-Description Writer, Safe Deposits Manager, Junior Executive, Trainee Manager, Administrative Assistant, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, Property-Disposal Officer, all Level III jobs *except* Direct-Mail Specialist.
Knowing effective internal communication, memorandums, interoffice correspondence; clarity and permanency of record; importance of documenting, etc.	All.
Letter organization, format, writing; correct grammatical usage; readable style; familiarity with sales, manufacturing, accounting areas.	All—*except* Clerical Technician, File Service Worker, Process-Description Writer, Safe Deposits Manager, General Foreman, Budget Officer, Interviewer and Claims Adjuster.
Working knowledge of statistical graph preparation; understanding of various statistical methods and tools commonly encountered in business.	Bank Cashier, Chief Clerk, Clerical Technician, Credit Union Supervisor, Junior Executive, Trainee Manager, Purchase-Price Analyst, Safe Deposits Manager, Administrative Assistant, Branch Manager, General Foreman, Procurement Services Supervisor, Budget Officer, Treasurer.
Interviewing people, conducting and evaluating interviews, methods of obtaining and checking references; knowledge of different types and methods of interviewing.	All—*except* Escrow Officer, Junior Executive, Trainee Manager, Title Clerk, Trust Officer.
Knowledge of, and practice in, operating duplicating, copying, computing machines.	Chief Clerk, Office Manager, Process-Description Writer, Title Clerk, Procurement Services Supervisor.
Methods of inventory control, types of systems in general use; physical and clerical inventories, monthly and yearly inventories; checking inventories; ordering and use systems.	Branch Manager, General Foreman, Procurement Services Supervisor, Chief Clerk.
Familiarity with types of materials, call-outs, standard specifications; checking conformity and quality; sources of material specification, information catalogs, engineering or purchasing departments invoices or records; understanding dimensions and physical properties; packaging and special specifications.	Purchase-Price Analyst, General Foreman, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Contract and Order Administrator.
Understanding of job instruction training, principles of learning; group instruction techniques and practice; materials development; practice in "how to," etc.	Chief Clerk, Clerical Technician, File Service Worker, Insurance Office Manager, Office Manager, Safe Deposits Manager, Administrative Assistant, Branch Manager, Oper-

	ations Officer, Credit and Collection Manager, Credit Union Supervisor, Junior Executive, Trainee Manager, Procurement Services Supervisor, General Foreman.
Knowledge of the various techniques employed in problem solving; exercise of logical and critical thinking in each step of the solution process.	All—*except* Safe Deposits Manager.
Helpful Skills	*Applicable Jobs*
Skill in clear and concise writing of business reports based on logical thinking; knowledge of various types of reports and current trends in report writing.	All Level III jobs—all Level I and II jobs *except* Escrow Officer, File Service Worker, Interviewer and Claims Adjuster, Loan Counselor, Process-Description Writer, Safe Deposits Manager, Vocational Disability Examiner, Account Executive, Contract Specialist, Property-Disposal Officer, Purchasing Agent.
Utilization of production control boards and charts, types of boards used, special designs; information to be found; posting and maintaining information; typical applications; practice in maintenance and use.	Branch Manager, General Foreman, Contract and Order Administrator.
Knowledge of quality control practices and statistical methods used.	Purchasing Agent, General Foreman, Industrial Organization Manager.
Understanding of time and motion economy, its application to production management and its effect on those in supervisory and administrative management positions.	Clerical Technician, File Service Worker, Process-Description Writer, General Foreman.
Understanding of interpersonal relations; need for good definitions; basic physical, social, and psychological needs; importance of communications; developing cooperative relationships—emotional maturity, attitudes, prejudices, values, etc.	All.
Payroll recordkeeping and the structure of employer and employee taxes.	Chief Clerk, Office Manager, Junior Executive, Trainee Manager, Insurance Office Manager, Administrative Assistant, Branch Manager, Credit Union Supervisor.
Knowledge of sound personnel policy formulation, and need for uniform application of such policies; establishment of controls to maintain policy effectiveness.	Office Manager, Administrative Assistant, Operations Officer, Financial Institution Manager, Industrial Organization Manager, Treasurer, Budget Officer.
Working knowledge of principles of work measurement and work simplification; appreciation of necessity for accuracy in measurement to determine advantages and effectiveness of new processes, materials, and equipment.	Bank Cashier, Chief Clerk, File Service Worker, Junior Executive, Office Manager, Trainee Manager, Administrative Assistant, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, Clerical Technician, Process-Description Writer, Purchase Price Analyst.
Functional Duties and Requirements	*Applicable Jobs*
Traffic management—logistics of supply and delivery, type of materials, legal involvements and requirements; carrier and shipper regulations; damage inspection, claim forms, etc.	Branch Manager, Tariff and Schedules Examiner, Contract and Order Administrator.
Preparation and writing of job descriptions, specifications, and evaluations; understanding how techniques contribute to the control of labor costs and avoidance of favoritism.	Chief Clerk, Clerical Technician, Insurance Office Manager, Junior Executive, Office Manager, Process-Description Writer, Trainee Manager, Vocational Disability Examiner, General Foreman, Operations Officer, Budget Officer, Administrative Assistant.
Working knowledge of performance standards; application of standards to filling of vacancies, selection for promotion, granting of increases, etc.	Chief Clerk, Administrative Assistant, Credit and Collection Manager, Credit Union Supervisor, File Service Worker, Insurance Office Manager, Office Manager, Process-Description Writer, Safe Deposits Manager, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, All Level III jobs *except* Direct-Mail Specialist.
Application of sound principles of budgeting; utilization of budgets as a major tool of management.	Account Executive, Administrative Assistant, Office Manager, Branch Manager, General Foreman, All Level III jobs *except* Direct-Mail Specialist.

Functional Knowledge	*Applicable Jobs*
Understanding of business contract law; definitions of terms, clarification of legal bases of business transactions.	Bank Cashier, Escrow Officer, Junior Executive, Loan Counselor, Title Clerk, Trainee Manager, Administrative Assistant, Branch Manager, Chief Credit Analyst, Contract Specialist, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Trust Officer, Budget Officer, Contract and Order Administrator, Financial Institution Manager, Industrial Organization Manager, Treasurer, Purchase-Price Analyst.
Working knowledge of the methods and steps involved in business forecasting; application of forecasting to the establishment of goals and programs.	Administrative Assistant, Trust Officer, Branch Manager, Financial Institution Manager, Procurement Services Supervisor, Budget Officer, Treasurer, Industrial Organization Manager.
Knowing fundamentals of cost accounting systems and methods for determining costs and prices through calculations.	Contract Specialist, Purchasing Agent, Purchase-Price Analyst, Branch Manager, Contract and Order Administrator.
Understanding bases for bid acceptance and procedures for contract formulation; basic steps and procedures essential to bid processing and contract administration.	Purchase-Price Analyst, Administrative Assistant, Branch Manager, Contract Specialist, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Contract and Order Administrator.
Theory and concepts of marketing and advertising as they relate to operating functions of industry; the role of the advertising agency in the overall marketing effort.	Account Executive, Property-Disposal Officer, Branch Manager, Direct-Mail Specialist, Insurance Office Manager, Industrial Organization Manager.
Knowing how to determine need for and proper selection of outside consulting services; essential factors to be considered, and types of situations in which consultants may be used to advantage.	Chief Credit Analyst, Financial Institution Manager, Direct-Mail Specialist, Budget Officer, Treasurer, Contract and Order Administrator, Industrial Organization Manager.
Working knowledge of shipping regulations and procedures; tariff references; methods of shipment preparation, determining methods of shipment; sources of directives, legislation, and regulations.	Tariff and Schedules Examiner, Branch Manager, Contract and Order Administrator.

Supplemental (Environmental) Knowledge	*Applicable Jobs*
Business investments—theory and practice as related to varying investment objectives; rationale for choosing one practice over another.	Trust Officer, Financial Institution Manager, Industrial Organization Manager, Treasurer, Loan Counselor.
Concepts and techniques of sound corporate financial planning and control.	Chief Credit Analyst, Trust Officer, Financial Institution Manager, Budget Officer, Treasurer, Industrial Organization Manager, Loan Counselor.
Administration of corporate insurance plans and programs; determination of industrial insurance needs.	Financial Institution Manager, Industrial Organization Manager, Insurance Office Manager.
Knowledge of current concepts and practices in organizational and manpower planning; considerations in situations involving subsidiaries, mergers, expansions, etc.	Administrative Assistant, Branch Manager, Contract and Order Administrator, Financial Institution Manager, Industrial Organization Manager, Treasurer, Budget Officer.
Understanding principles of business economics and its place in the American economic system.	Bank Cashier, Junior Executive, Purchase-Price Analyst, Trainee Manager, Administrative Assistant, Branch Manager, Chief Credit Analyst, General Foreman, Procurement Services Supervisor, Purchasing Agent, Trust Officer, Budget Officer, Contract and Order Administrator, Financial Institution Manager, Industrial Organization Manager, Treasurer.
Understanding data processing, associated equipment, applications, preparation of input, etc.	Chief Clerk, Clerical Technician, Credit and Collection Manager, File Service Worker, Office Manager, Purchase-Price Analyst, Procurement Services Supervisor, Budget Officer, Treasurer, Financial Institution Manager, Industrial Organization Manager.

RELEVANT WORK EXPERIENCE

Relevant work experience projects are set forth for each position in the section, *Relevant Work Experience*. Relevant work experiences may be obtained in a variety of ways. They may be gained through direct work-experience programs or through simulated or intensive laboratory-learning programs. The regulations governing cooperative programs are found in Section 104.16 of Part 104—Administration of Vo-

cational Education, Federal Allotments to States, Rules and Regulations, of the Vocational Education Act of 1963. Directed work experience and simulated experience programs should supplement regular study plans to provide realistic opportunities to practice developed skills and knowledge. Flexibility of scheduling can be provided by counselors and school administrators to allow work-experience project time to be concurrent with the final phases of a course of study or as employability standards for the career objective of the trainee are achieved.*

Youth organizations which offer work experience complementary to the course of study may also be employed as vehicles to provide relevant work experiences, insofar as they are supervised in accordance with Section 104–13 (1) of the Rules and Regulations.

SCHOOL OFFERINGS

The educational facilities at which studies for the jobs covered by this guide may be offered are:

Occupational Levels	*Facilities*
Level I	General Office Education Units may be studied at high school, post-secondary and adult, MDTA, or (area) supplemental facilities. Specialized Office Education Units may be studied at post-secondary, junior, community, and senior college, MDTA, or (area) supplemental facilities.
Levels II and III	General Office Education Units may be studied at high school, post-secondary and adult, junior and community college, MDTA, or (area) supplemental facilities. Specialized Office Education Units may be studied at all the above facilities except high school. Administrative Office Education Units will usually be available only at MDTA or junior, community, and senior college facilities.

* It is important to note that, because of the levels of responsibility inherent in supervisory and administrative management positions, it will usually not be feasible to arrange directed work experiences for trainees in these categories. Consequently, as is noted in the section, *Relevant Work Experience*, simulated work experiences on a project basis will have to be established for each trainee.

ABOUT THE CURRICULUMS

Many factors were considered in designing the curriculums for the occupational field in order to provide trainees with realistic job preparation. Implementation of the curriculum in educational agencies offering general, specialized, or administrative units of study was also considered. This section explains how the various factors affected the curricula design.

TRAINING POPULATION

The Vocational Education Act of 1963 and the Manpower Development and Training Act, as amended, provide funds for training of in-school persons, persons who are employed and wish to upgrade skills, unemployed and underemployed persons who wish to develop new skills according to their abilities and aptitudes, and persons whose previously learned skills have fallen into disuse and who need refreshment of these skills to reenter the labor market. Age, experience, and educational continuity that would characterize possible participants in the various programs had to be weighed in order to provide for training to the proficiency levels desired and to tailor specific programs to meet individual needs. As a consequence, many units of study evidence overlap or repetition of content. This overlap should provide opportunity for review and refreshment. It is suggested that teachers, supervisors, and administrators carefully consider group or class composition based on assessment of individual achievements and training needs. If achievement and aptitude testing is accomplished before a trainee enters the program, counselors and teachers should be better able to make recommendations for tailored programs to meet individual career objectives. Teachers should continually assess the progress of every trainee in each unit, and discuss and plan for the remedial work that may be required. Teachers should also determine whether the trainee would profit from continuing his course of study.

Because of the variation in the eligible training population, some units may be given in the evening or in part-time programs. The courses of study for the occupations are sufficiently flexible to permit their adaptation to the time available by either limiting the program "load" or extending the daily or total hours of particular units.

JOB DESCRIPTIONS

The D.O.T. job titles and definitions were used to identify the jobs covered by the curriculums. The precision of each job title and job description in the occupational field posed a problem. Many titles for the same job were found. The extent and scope of duties and responsibilities for similar jobs varied widely. For example, the "chief clerk" in one organization may have all the duties and responsibilities that an "office manager" has in another; the function of purchasing administration may be performed by people with different job titles in different organizations. Consequently, such terms are used interchangeably in this guide as they are in the occupational field.

Programs of study for different job titles, suggested by job analysis and on the basis of what may be performed by a position holder, are often similar. In addition, the worker must be prepared to exhibit knowledge and to cope with tasks beyond those implied in the job definition or description. In each program of study, therefore, provision has been made to develop skills and knowledges of the trainee to more than "just meet" minimal requirements. This feature should provide motivation for the worker to pursue further education for advancement.

LINES OF ADVANCEMENT

Clear-cut lines of job progression are not usually found in this occupational field. It is therefore difficult to establish levels of personal achievement (such as improved job skills) which would result in orderly or automatic advancement. In addition to the basic skills offered by a job applicant, other variables such as skills availability in the labor market, personal

interest, intelligence, appearance, loyalty, experience, education, "politically sound organization moves," and tenure are often included and weighted in employers' considerations of promotion. The curriculum design permits trainees for any position, or in a particular course of study, to elect certain units which might further career objectives.

The educational programs for each job shown in the *Curriculum Synopses* section are intended to qualify trainees for jobs in the following levels:

Level 1. Entry office skilled positions with upgrading to lower supervisory and administrative management positions.

Level 2. Entry office technical positions with upgrading to specialized supervisory and administrative management positions.

Level 3. Entry office administrative positions with upgrading to high level supervisory management positions.

Level I

Bank Cashier
Chief Clerk
Clerical Technician
Credit and Collection Manager
Credit Union Supervisor
Escrow Officer
File Service Worker
Insurance Office Manager
Interviewer and Claims Adjuster
Junior Executive
Loan Counselor
Office Manager
Process-Description Writer
Purchase-Price Analyst
Safe Deposits Manager
Title Clerk
Trainee Manager
Vocational Disability Examiner

Level II

Account Executive
Administrative Assistant
Branch Manager
Chief Credit Analyst
Contract Specialist
General Foreman
Operations Officer
Procurement Services Supervisor
Property-Disposal Officer
Purchasing Agent
Tariff and Schedules Examiner
Trust Officer

Level III

Budget Officer
Contract and Order Administrator
Direct-Mail Specialist
Financial Institution Manager
Industrial Organization Manager
Treasurer

Specific information about each of these jobs, arranged by level, is given in the *Job Descriptions, Occupational Prerequisites, and Suggested Training* section. Job titles, as listed in the D.O.T., are given in the *About the Dictionary of Occupational Titles* section.

The levels classifications indicate the degree to which the worker must be specialized or at which the worker assumes administrative responsibilities. The levels do not indicate the extent or intensiveness of study required or suggested in this guide, nor the degree to which employers may distinguish between them. Further, the levels are not indicative of salaries associated with the positions.

PATTERN OF DEVELOPMENT OF CURRICULUMS

The office occupations education cycle, used as a guide in developing the entire curriculum, consists of the following steps:

1. Identification of the occupational grouping:
   - *a.* Description and analysis of each job in the occupational field to meet employer requirements
   - *b.* Analysis of each job in terms of skills and knowledge required of job holder to perform effectively
   - *c.* Analysis of each job in terms of the social and background knowledge required for ready integration into the work environment.
2. Translation of findings to a curriculum:
   - *a.* Content and sequence of learning
   - *b.* Establishment of performance standards (standards of achievement) in skill areas
   - *c.* Establishment of standards of background knowledge

d. Suggestions for teaching skills and knowledge required in terms of learning experience for the trainee
e. Suggestions of pertinent readings for teacher and trainee, and teaching-learning materials and media.

3. Educational operation:

a. Selection of trainees
b. Suggestion to teacher for employing community resources to expand learning experiences both in and out of school facilities or environment
c. Emphasis on attainment of skill performance standards by trainee rather than on "grades"
d. Testing of social background and environmental knowledge
e. Use of individual and group media for learning
f. Provision of realistic materials for trainee practice
g. Realistic opportunity to practice acquired skills and knowledge through the use of relevant work experience projects.

4. Initial entry to work through simulated, directed, or cooperative programs where practical. In instances where the nature of the initial job assignment prevents actual work experience, further relevant work experience projects are suggested.

5. Feed-back from the "world of work" into the educational operation:

a. Followup by coordinating teachers
b. Placement problems
c. Current job information and tasks
d. Continual updating of curriculums.

STARTING AND CONTINUING OFFICE EDUCATION

The possible variation in the time at which office vocational education may be started by each trainee was a factor influencing curriculum design. Some in-school trainees may elect to start vocational preparation in the eleventh grade of high school; others may wait until after graduation from high school before beginning specific vocational preparation; still others may begin after partial or completed post-secondary education.

The starting point for any trainee will depend on his education, the extent and variety of his experience, his present position within an organization, and the demonstration of knowledge in particular areas of study, however acquired. For many jobs covered by this guide, certain basic experience in a given field was assumed.

Although there is a tendency on the part of some employers to hire college graduates for some positions and then to provide them with on-the-job training, the type of college education is not usually specified. There is no indication that an unspecified college education completed by a trainee fits him any better for a specialized position in the occupational field than experience in the field and specialized training. For example, many of the position holders of jobs in this guide had majored in liberal arts, law, engineering, or personnel and business administration. However, since section I of the Vocational Education Act of 1963 states in part, "persons of all ages in all communities of the State . . . will have ready access to vocational training or retraining which is of high quality, which is realistic in the light of actual or anticipated opportunities for gainful employment . . .," the outlook of employers in regard to preferring college graduates for employment in the occupational field must be carefully considered in light of anticipated opportunities for gainful employment. The suggested training for these jobs, on the other hand, assumes certain minimum levels of completed education and may offer approximations of the years of experience needed for a ready grasp of the subject matter and development of the abilities to fulfill the duties and responsibilities of the job. Further, section 104.13 (d) (2) of Part 104—Administration of Vocational Education: Federal Allotments to States, Rules and Regulations, specifically does not exclude the jobs covered by this curriculums guide from vocational instruction. In fact, this subsection states, "The above is not intended to exclude from vocational instruction those semiprofessional, technical, or other occupations which are related to those listed, but which do not themselves require a baccalaureate degree." The word "above" refers to a list of excluded occupations.

Surveys show that many positions in the field are being held by persons without a college degree, indicating that a postsecondary institution degree is not mandatory to meet the requirements of a particular job. Specialized training and experience, however, would seem to be warranted for development or upgrading of skills required for certain jobs.

Mobility of the training population was also considered. Rather than comparing offerings of one school or college with another, the curriculum design pro-

vides for continuation of studies, regardless of the school in which vocational preparation was initiated, provided that the trainee meets the specific prerequisites for the unit of study. Almost all units specify Standards of Achievement to be met by the trainee as evidence of successful training. Where the standards are expressed in quantified terms, the achievement of the standards (rather than grades) by the trainee would indicate his eligibility for advanced study.

SPECIALIZATION STUDIES

The study units are divided into three sections: General, Specialized, and Administrative Office Education units. This permits using one or several facilities in an area to complete vocational preparation required for specialized work. It also permits a district or system to offer certain specialized programs in one location and others at a different location. Further, trainees having like career objectives but who are from different locations within the district can be grouped. Many of the specialized units of study are needed for certain jobs. In other cases, they may help to develop certain proficiencies.

ADMINISTRATIVE AND INDETERMINATE STUDY PROGRAMS

Because of the requirements of certain positions, a definite program of study is difficult to design for any given group of individuals. Differences in experience, education, and employer expectations of trainees will affect the training required. Thus, counselors and teachers must tailor the suggested programs to meet individual needs. Similarly, trainees who need supervisory training may elect specified administrative units after discussing their situations with the counselor.

SUBJECT UNIT ALTERATION

The suggested units of study do not attempt to provide the extent of detailed subject coverage usually associated with teachers' manuals or other curriculum materials. The descriptions for each unit of study include some teaching and evaluation suggestions which may be helpful. Insofar as possible, an attempt has been made to provide a chronological sequence of topics in each unit of study. Because such factors as trainee knowledge and skills may be disparate in any given group, the extent of review, methods of presentation, and the topical sequence is left to the discretion of the teacher and/or department supervisor. In addition, teachers and administrators are encouraged to develop detailed lesson plans and to use ingenuity in devising or using various teaching aids to accelerate learning. Helpful, recent texts and materials are listed under each unit. Others are listed in the appropriate appendix sections. Many of the materials should be previewed before selections are made.

GENERAL PRESENTATION SUGGESTIONS

Trainees enrolled in entry occupational programs are expected to have completed approximately 12 years of formal education and to have a working knowledge of English and elementary arithmetic.

In skill development subjects, lectures and discussions should be kept to the minimum required for understanding procedures and operating instructions. As much time as possible should be devoted to actual trainee practice.

In the social knowledge subjects, a variety of methods should be used. Role playing, case study, group discussion, lectures, and motion pictures can all be used effectively. Varied presentation can serve to heighten interest, participation, and learning. Although a special unit has not been included in the curricula for developing proper study habits, teachers and administrators should stress this area. Many booklets and pamphlets are available to help trainees with this important topic.

Periodic progress checks should be made throughout the course of study of each unit to evaluate trainee progress toward meeting the suggested standards of achievement. In addition, these checks can serve as a guide to review material that may not have been learned fully.

The teacher should consider using community resources for training. Guest speakers from business, trade, and professional associations, consulting organizations, and company management can assist with special topics and can help trainees relate their activities to local business needs and standards.

Motivation and morale building should be a part of every class and practice period. It is suggested that teachers make an effort early in the program to establish a teaching climate which will heighten and maintain the trainee's interest. The success of the program can be judged only by the number of trainees who remain gainfully employed and who advance in their careers.

REMEDIAL INSTRUCTION

The Vocational Education Act provides for remedial education of trainees who may be experiencing difficulties in a course of study for an occupation. Counselors and teachers should be on the alert for trainee handicaps and should take appropriate steps to provide remedial training. For example, the teacher should not hesitate to recommend Oral Communications to persons who have noticeable difficulty in speaking.

OVERLEARNING

Each course or unit of study provides opportunity for the trainee to overlearn rather than merely meet minimal occupational requirements. This is important, since there is often a time lag between completion of the studies and employment or subsequent sequential learning. In addition to the curriculums, relevant work experience projects have been suggested to help in overlearning.

RELEVANT WORK EXPERIENCE PROJECTS

The simulated or on-the-job experiences provided as part of the total curricula design serve not only the purpose of overlearning but also help the individual trainee improve on other prior achievements. Relevant work experience projects times shown in the *Curriculum Synopses* section are approximate times only. Variations in the training population, school facilities, and employing organizations will necessitate adjustment of these times for individual trainees and programs.

CURRICULUM OUTLINES

GENERAL OFFICE EDUCATION UNITS

Unit title	*Code*	*Hours*
Accelerated Reading (Remedial)	AR	50 (variable)
Oral Communication (Remedial)	OC	15 (variable)
Business Correspondence	BC	30
Business Data and Statistics	BDS	30
Business Economics	BE	80
Business Principles and Organization	BPO	30
Business Reports	BR	15
Effective Internal Communications	EIC	30
Effective Interpersonal Relations	ER	40
Employee Appraisal and Counseling	EAC	60
Fundamentals of Interviewing	FI	30
Indexing and Filing Practices	IFP	30
Introduction to Business Data Processing	BDP	30
Office Machines—Computing and Duplicating	OM	30
Problem-Solving Techniques	PSL	30
Public Speaking	PS	40
Records Management	RM	20

SPECIALIZED OFFICE EDUCATION UNITS

Budgeting	B	40
Business Contract Law	BCL	30
Business Forecasting	BF	20
Business Investments	BI	15
Calculating Costs and Prices	CCP	20
Corporate Financial Planning and Control	CFP	40
Corporate Insurance Practice	CIP	30
Forms Design	FD	20
Introduction to Bids and Contracts	IBC	15
Inventory Control Practices	ICP	30
Job Descriptions, Specifications, and Evaluation	JD	60
Material Specifications	MS	30
Procedures Writing	PW	15
Production Control Boards and Charts	CBC	60
Production Reports, Estimates, and Schedules	RES	30
Quality Control Practices	QC	20
Shipping Regulations and Procedures	SRP	30
Time and Motion Economy	TME	30

Unit Title	*Code*	*Hours*
Traffic Management	TM	80
Union Contract Administration	UCA	60
Wage and Salary Administration	WSA	60
Work Simplification	WS	30

ADMINISTRATIVE OFFICE EDUCATION UNITS

Basic Training Methods and Practices	BTM	70
Developing Organizational and Operational Objectives	DOO	30
Induction and Orientation of Employees	IOE	30
Organizational and Manpower Planning	OMP	60
Payroll and Employee Tax Records	PTR	10
Performance Standards	PST	30
Personnel Policies	PP	40
Principles of Effective Supervision	PES	60
Public and Community Relations	PCR	30
Techniques of Marketing and Advertising	TMA	40
Use of Consultants	UOC	10

CURRICULUM SYNOPSES

Since many of the occupational training programs have identical subject units, trainees with different career objectives may be grouped for certain units, thus conserving teaching time, space, facilities, and equipment. The typical programs shown within this section are suggested for intensive training either under the Vocational Education Act of 1963 or the Manpower Development and Training Act, as amended. Special units of study required in local areas are not shown.

General education and special State-required subjects of study are not shown in the typical programs. Administrators and teachers incorporating these types of studies in the vocational training program may provide for them by extending the programs shown. One way to include other required study units is by deferring certain of the suggested units until later in the program. In each instance, factors such as skills development, practice, motivation, and orientation to the occupational field must be considered carefully along with school enrollment, availability of teacher's time and work load, and required facilities.

Trainees requiring programs specially tailored to their particular needs, such as refreshing or upgrading of skills, can be slotted into the schedule for appropriate units, and separate arrangements can be made for special studies. Although remedial study units such as Oral Communication are not shown, special programs can be developed to include them where deficiences exist.

Programs are assumed to be continuous. Normal semester lengths are not indicated. Provisions for vacation time, study periods, etc., should be made by State and local school administration. Study periods can be guided by the teacher-coordinator. The training day is assumed to be six hours. Luncheon periods, home room time, and counseling time are not shown. Reference should be made to the *Relevant Work Experience* section for trainees who may be nearing completion of their programs. Codes for the subject units in the program are shown in the *Curriculum Outlines* section with their full unit titles.

LEVEL I JOBS

Bank Cashier (banking) 186.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 4	BE	BE	RM	BCL	PES	PES
5 to 6	BE	BE	BC	BCL	PES	PES
7	BE	BE	BC	Study	WS	WS
8	BE	BE	BC	PS	WS	WS
9	Study	Study	BC	PS	WS	WS
10	BDS	BDS	BC	PS	ER	ER
11 to 12	BDS	BDS	BR	PS	ER	ER
13	Study	Study	BR	PS	ER	ER
14 to 15	PCR	EIC	EIC	PS	EAC	EAC
16	PCR	EIC	EIC	Study	EAC	EAC
17 to 19	PCR	Study	PSL	PSL	EAC	EAC
20 to 21	Relevant Work Experience Projects					

Manager, Safe Deposits (banking) 186.138

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BDS	BDS	BTM	BTM	PES	PES
4 to 6	PST	PST	BTM	BTM	PES	PES
7	RM	Study	BTM	BTM	EAC	EAC
8 to 10	RM	Study	ER	ER	EAC	EAC
11	R.W.E. Projects		ER	ER	EAC	EAC
12	Rel. Work Exp. Proj.				EAC	EAC

Chief Clerk (any ind.) 169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	JD	JD	BDS	BDS	PES	PES
4 to 6	JD	JD	BDP	RM	PES	PES
7	WSA	WSA	BDP	RM	WS	WS
8 to 9	WSA	WSA	BDP	FD	WS	WS
10 to 11	WSA	WSA	PTR	FD	ER	ER
12	WSA	WSA	FI	FI	ER	ER
13	ICP	ICP	FI	FI	ER	ER
14	ICP	ICP	FI	FI	EAC	EAC
15	ICP	ICP	PST	PST	EAC	EAC
16 to 17	EIC	EIC	PST	PST	EAC	EAC
18	EIC	EIC	PW	BR	EAC	EAC
19	PSL	PSL	PW	BR	EAC	EAC
20	PSL	PSL	PW	BR	BTM	BTM
21	PSL	PSL	BC	IOE	BTM	BTM
22 to 26	R.W.E. Projects		BC	IOE	BTM	BTM

Manager, Credit and Collection (any ind.)—168.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BTM	BTM	RM	BR	PES	PES
4	BTM	BTM	RM	BDP	PES	PES
5 to 6	BTM	BTM	BC	BDP	PES	PES
7	BTM	BTM	BC	BDP	FI	FI
8 to 9	PSL	PSL	BC	BDP	FI	FI
10	PSL	PSL	BC	Study	ER	ER
11 to 13	EAC	EAC	PST	PST	ER	ER
14 to 16	EAC	EAC	Rel. Work Exp. Projects			

Supervisor, Credit Union (finan. inst.)—186.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BTM	BTM	RM	BR	PES	PES
4	BTM	BTM	RM	PTR	PES	PES
5	BTM	BTM	BC	PTR	PES	PES
6	BTM	BTM	BC	Study	PES	PES
7	BTM	BTM	BC	Study	FI	FI
8 to 9	PSL	PSL	BC	Study	FI	FI
10	PSL	PSL	BC	Study	ER	ER
11 to 13	EAC	EAC	PST	PST	ER	ER
14 to 16	EAC	EAC	EIC	EIC	BDS	BDS
17 to 18	Relevant Work Experience Projects					

Manager, Insurance Office (insurance)—186.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 6	BTM	BTM	BPO	IOE	PES	PES
7	BTM	BTM	RM	BR	FI	FI
8 to 9	PSL	PSL	RM	BR	FI	FI
10	PSL	PSL	RM	Study	ER	ER
11 to 13	EAC	EAC	PST	PST	ER	ER
14 to 16	EAC	EAC	EIC	EIC	BDS	BDS
17 to 18	TMA	PS	CIP	PTR	BC	PCR
19 to 22	TMA	PS	CIP	Study	BC	PCR
23 to 24	TMA	PS	Rel. Work Exp. Projects			
25	Relevant Work Experience Projects					

Junior Executive (any ind.) and Manager, Trainee (any ind.)—189.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 6	BTM	BTM	BPO	BCL	PES	PES
7	BTM	BTM	RM	PW	WS	WS
8 to 9	PSL	PSL	RM	PW	WS	WS
10	PSL	PSL	RM	PTR	ER	ER
11	JD	JD	Study	PTR	ER	ER
12 to 13	JD	JD	BE	BE	ER	ER
14 to 16	JD	JD	BE	BE	BDS	BDS
17 to 19	EIC	EIC	BE	BE	BR	BC
20 to 22	Relevant Work Experience Projects					BC

Manager, Office (any ind.)—169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 6	BTM	BTM	BPO	IOE	PES	PES
7	BTM	BTM	Study	RM	FI	FI
8 to 9	PSL	PSL	PTR	RM	FI	FI
10	PSL	PSL	Study	RM	ER	ER
11 to 13	JD	JD	PST	PST	ER	ER
14 to 16	JD	JD	EIC	EIC	WS	WS
17	WSA	WSA	Study	PW	EAC	EAC
18 to 19	WSA	WSA	BR	PW	EAC	EAC
20	WSA	WSA	BR	Study	EAC	EAC
21 to 22	WSA	WSA	BC	BDP	EAC	EAC
23 to 26	FD	Study	BC	BDP	B	B
27 to 28	Relevant Work Experience Projects					

Clerical Technician (profess. & kin.)—161.268

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BTM	BTM	TME	BDP	WS	WS
4 to 6	BTM	BTM	TME	BDP	BDS	BDS
7	BTM	BTM	BR	RM	FI	FI
8 to 9	PSL	PSL	BR	RM	FI	FI
10	PSL	PSL	FD	RM	ER	ER
11 to 13	JD	JD	FD	PW	ER	ER
14 to 16	JD	JD	EIC	EIC	R.W.E. Projects	

File Service Worker (bus. ser.)—161.268

The program for these trainees is the same as that for Clerical Technician 161.268 through week 10, except for BDS and BR. Substitute IFP for BDS and Study for BR. The program below starts at week 11.

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
11 to 13	PES	PES	FD	PW	ER	ER
14 to 16	PES	PES	R.W.E. Projects		PST	PST
17	Relevant Work Experience Projects					

Loan Counselor (banking)—169.268

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BCL	EIC	EIC	BC	FI	FI
4 to 6	BCL	CFP	CFP	BC	ER	ER
7	Study	CFP	CFP	RM	ER	ER
8 to 10	PSL	PSL	BI	RM	R.W.E. Projects	

Purchase-Price Analyst (profess. & kin.)—162.188

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	IBC	MS	BDP	BR	WS	WS
4 to 6	RM	MS	BDP	Study	BDS	BDS
7	RM	Study	CCP	CCP	FI	FI
8	PSL	PSL	CCP	CCP	FI	FI
9	PSL	PSL	BE	BE	FI	FI
10	PSL	PSL	BE	BE	ER	ER
11 to 13	BCL	BC	BE	BE	ER	ER
14 to 16	BCL	BC	BE	BE	EIC	EIC
17 to 18	Relevant Work Experience Projects					

Title Clerk (petrol. production; petrol. refin.; pipe lines)—162.288

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	OM	BCL	BC	BR	BE	BE
4 to 6	OM	BCL	BC	Study	BE	BE
7 to 8	ER	ER	RM	Study	BE	BE
9 to 10	ER	ER	RM	Study	PSL	PSL
11	Rel. Work Exp. Proj.				PSL	PSL
12	Relevant Work Experience Projects					

Escrow Officer (profess. & kin.)—169.388

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)				
	1	2	3	4	5
1 to 4	BCL	BC	RM	ER	ER
5 to 6	BCL	BC	Study	PSL	PSL
7	Rel. Work Exp. Proj.			PSL	PSL

Process-Description Writer (any ind.)—012.188

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	TME	OM	WS	WS	PES	PES
4 to 6	TME	OM	PSL	PSL	PES	PES
7 to 9	JD	JD	PST	PST	FI	FI
10 to 12	JD	JD	EAC	EAC	ER	ER
13	EIC	EIC	EAC	EAC	ER	ER
14 to 15	EIC	EIC	EAC	EAC	Study	PW
16	Relevant Work Experience Projects					PW

Interviewer and Claims Adjuster (gov. ser.)—169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	FI	FI	IFP	IFP	ER	ER
4	Rel. Work Exp. Proj.				ER	ER

Vocational Disability Examiner (gov. ser.)—169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	JD	JD	IFP	IFP	FI	FI
4 to 5	JD	JD	BC	Study	ER	ER
6	JD	JD	BC	RM	ER	ER
7	EIC	EIC	BC	RM	ER	ER
8 to 9	EIC	EIC	BC	RM	PSL	PSL
10	Rel. Work Exp. Proj.				PSL	PSL

LEVEL II JOBS

Contract Specialist (gov. ser.)—162.118

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BCL	BC	IBC	RM	FI	FI
4	BCL	BC	Study	RM	EIC	EIC
5 to 6	BCL	BC	ER	ER	EIC	EIC
7 to 8	CCP	CCP	ER	ER	PSL	PSL
9	Rel. Work Exp. Proj.				PSL	PSL

Manager, Branch (any ind.)—183.118 and Administrative Assistant (any ind.)—169.168

These groups of trainees have identical programs for the first 25 weeks as shown directly below. Continuation programs, beginning with week 26, follow for each group.

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 6	BPO	BCL	BE	BE	PES	PES
7 to 8	B	B	BE	BE	FI	FI
9	B	B	DOO	DOO	FI	FI
10	B	B	DOO	DOO	ER	ER
11	JD	JD	DOO	DOO	ER	ER
12 to 13	JD	JD	OMP	OMP	ER	ER
14 to 16	JD	JD	OMP	OMP	WS	WS
17	WSA	WSA	OMP	OMP	PST	PST
18 to 19	WSA	WSA	IOE	RM	PST	PST
20 to 21	WSA	WSA	IOE	RM	BTM	BTM
22	WSA	WSA	IOE	Study	BTM	BTM
23	BDS	BDS	IOE	PW	BTM	BTM
24 to 25	BDS	BDS	PTR	PW	BTM	BTM

For Branch Manager trainees:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
26	UCA	UCA	EIC	EIC	BTM	BTM
27 to 28	UCA	UCA	EIC	EIC	EAC	EAC
29 to 31	UCA	UCA	BC	PS	EAC	EAC
32	ICP	ICP	BC	PS	EAC	EAC
33 to 34	ICP	ICP	BC	PS	PSL	PSL
35	PCR	TM	TM	PS	PSL	PSL
36	PCR	TM	TM	PS	CBC	CBC
37 to 40	PCR	TM	TM	TMA	CBC	CBC
41	RES	TM	TM	TMA	CBC	CBC
42	RES	TM	TM	TMA	IBC	BR
43 to 44	RES	CCP	CCP	TMA	IBC	BR
45 to 46	RES	BF	BF	Rel. Work Exp. Proj.		
47 to 48	Relevant Work Experience Projects					

For Administrative Assistant trainees:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
26	PP	PP	EIC	EIC	BTM	BTM
27 to 28	PP	PP	EIC	EIC	IBC	BC
29	PP	PP	PSL	PSL	IBC	BC
30 to 31	BF	BF	PSL	PSL	BR	BC
32	Rel. Work Exp. Proj.				BR	BC
33 to 34	Relevant Work Experience Projects					

Trust Officer (banking)—186.118

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BR	BCL	BE	BE	ER	ER
4	BC	BCL	BE	BE	ER	ER
5 to 6	BC	BCL	BE	BE	PSL	PSL
7	BC	BI	BE	BE	PSL	PSL
8	BC	BI	BE	BE	CFP	CFP
9	BC	BI	EIC	EIC	CFP	CFP
10 to 11	RM	Study	EIC	EIC	CFP	CFP
12 to 13	RM	Relevant Work Experience Projects				

Account Executive (profess. & kin.)—164.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	TMA	PS	FI	FI	ER	ER
4	TMA	PS	BC	PCR	ER	ER
5 to 7	TMA	PS	BC	PCR	PSL	PSL
8	TMA	PS	BC	PCR	B	B
9	EIC	EIC	BC	PCR	B	B
10 to 11	EIC	EIC	R.W.E. Projects		B	B
12	Relevant Work Experience Projects					

General Foreman (any ind.)—183.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 6	BPO	BCL	BE	BE	PES	PES
7 to 8	B	B	BE	BE	FI	FI
9	B	B	QC	MS	FI	FI
10	B	B	QC	MS	ER	ER
11 to 12	JD	JD	QC	MS	ER	ER
13	JD	JD	RM	MS	ER	ER
14	JD	JD	RM	MS	WS	WS
15 to 16	JD	JD	RM	TME	WS	WS
17 to 19	WSA	WSA	RES	TME	PST	PST
20	WSA	WSA	RES	TME	BTM	BTM
21 to 22	WSA	WSA	RES	Study	BTM	BTM
23 to 25	ICP	ICP	BDS	BDS	BTM	BTM
26	UCA	UCA	EIC	EIC	BTM	BTM
27 to 28	UCA	UCA	EIC	EIC	EAC	EAC
29 to 31	UCA	UCA	CBC	CBC	EAC	EAC
32	BR	Study	CBC	CBC	EAC	EAC
33 to 34	BR	Study	CBC	CBC	PSL	PSL
35	Rel. Work Exp. Proj.				PSL	PSL
36 to 37	Relevant Work Experience Projects					

Operations Officer (banking)—186.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	JD	JD	BR	BC	PES	PES
4 to 5	JD	JD	Study	BC	PES	PES
6	JD	JD	IOE	BC	PES	PES
7 to 9	WSA	WSA	IOE	RM	WS	WS
10	WSA	WSA	IOE	RM	ER	ER
11	WSA	WSA	IOE	Study	ER	ER
12	WSA	WSA	FI	FI	ER	ER
13	BTM	BTM	FI	FI	ER	ER
14	BTM	BTM	FI	FI	EAC	EAC
15 to 17	BTM	BTM	PST	PST	EAC	EAC
18 to 19	BTM	BTM	EIC	EIC	EAC	EAC
20	R.W.E. Projects		EIC	EIC	PSL	PSL
21	Rel. Work Exp. Proj.				PSL	PSL
22	Rel. Work Exp. Proj.				PSL	PSL

Supervisor, Procurement Services (any ind.)—162.168

A typical program for these trainees is shown below. The elective unit, Basic Training Methods and Practices (BTM), is not shown.

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	IBC	BCL	BE	BE	PES	PES
4 to 6	FD	BCL	BE	BE	PES	PES
7	FD	Study	BE	BE	FI	FI
8	PSL	PSL	BE	BE	FI	FI
9	PSL	PSL	BC	MS	FI	FI
10	PSL	PSL	BC	MS	ER	ER
11 to 13	EAC	EAC	BC	MS	ER	ER
14	EAC	EAC	BC	MS	WS	WS
15 to 16	EAC	EAC	ICP	ICP	WS	WS
17	EIC	EIC	ICP	ICP	PST	PST
18 to 19	EIC	EIC	Study	RM	PST	PST
20 to 21	BF	BF	RES	RM	BDP	BR
22	BDS	BDS	RES	Study	BDP	BR
23 to 24	BDS	BDS	RES	PW	BDP	Study
25	Study	Study	RES	PW	BDP	Study
26	Relevant Work Experience Projects					

Property-Disposal Officer (gov. ser.)—169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	IBC	BCL	TMA	MS	ER	ER
4	RM	BCL	TMA	MS	ER	ER
5 to 6	RM	BCL	TMA	MS	BC	PCR
7	RM	Study	TMA	Study	BC	PCR
8	PSL	PSL	TMA	Study	BC	PCR
9 to 10	PSL	PSL	EAC	EAC	BC	PCR
11 to 13	EIC	EIC	EAC	EAC	R.W.E. Projects	
14	R.W.E. Projects		EAC	EAC	R.W.E. Projects	

Credit Analyst, Chief (banking)—160.288

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 4	RM	BCL	BE	BE	CFP	CFP
5 to 6	BR	BCL	BE	BE	FI	FI
7	BR	PCR	BE	BE	FI	FI
8	UOC	PCR	BE	BE	ER	ER
9	UOC	PCR	PSL	PSL	ER	ER
10 to 11	BC	PCR	PSL	PSL	ER	ER
12	BC	PCR	Study	Rel. Work Exp. Proj.		
13 to 15	BC	EIC	EIC	Rel. Work Exp. Proj.		

Examiner, Tariff and Schedules (gov. ser.)—169.168

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	SRP	BC	TM	TM	Study	RM
4	SRP	BC	TM	TM	BR	RM
5 to 6	SRP	BC	TM	TM	BR	Study
7	Study	Study	TM	TM	FI	FI
8	PSL	PSL	TM	TM	FI	FI
9	PSL	PSL	EIC	EIC	FI	FI
10	PSL	PSL	EIC	EIC	ER	ER
11	Study	Study	EIC	EIC	ER	ER
12 to 13	Rel. Work Exp. Proj.				ER	ER

Purchasing Agent (any ind.)—162.158

A typical program for these trainees is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	IBC	BCL	BE	BE	MS	BC
4 to 6	QC	BCL	BE	BE	MS	BC
7	QC	Study	BE	BE	FI	FI
8	PSL	PSL	BE	BE	FI	FI
9	PSL	PSL	CCP	CCP	FI	FI
10	PSL	PSL	CCP	CCP	ER	ER
11 to 13	RM	Study	EIC	EIC	ER	ER
14	RM	Relevant Work Experience Projects				
15	Relevant Work Experience Projects					

LEVEL III JOBS

The typical program for 19 weeks, as shown below, applies to all Level III job trainees except Direct-Mail Specialist. A special note concerning the unit, Fundamentals of Interviewing (FI), is indicated by an asterisk. Starting with Week 20, programs for separate trainee groups follow the basic program.

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 4	BCL	RM	BE	BE	PES	PES
5 to 6	BCL	PW	BE	BE	PES	PES
7	Study	PW	BE	BE	FI*	FI*
8	PSL	PSL	BE	BE	FI*	FI*
9	PSL	PSL	Study	Study	FI*	FI*
10	PSL	PSL	PST	PST	ER	ER
11 to 12	PCR	BC	PST	PST	ER	ER
13	PCR	BC	UOC	BR	ER	ER
14	PCR	BC	UOC	BR	EAC	EAC
15	PCR	BC	Study	BR	EAC	EAC
16	PCR	BC	B	B	EAC	EAC
17 to 19	EIC	EIC	B	B	EAC	EAC

* This unit does not apply to Manager, Industrial Organization (any ind.), and Treasurer (any ind.). Replace with Developing Organizational and Operational Objectives (DOO).

Administrator, Contract and Order (any ind.)—162.118

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
20 to 23	MS	QC	FD	RES	TM	TM
24 to 25	MS	CCP	CCP	RES	TM	TM
26 to 27	CBC	CBC	IBC	Study	TM	TM
28	CBC	CBC	IBC	Rel. Work Exp. Proj.		
29 to 31	CBC	CBC	Rel. Work Exp. Proj.			

Manager, Industrial Organization (any ind.)—189.118

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
20 to 25	WSA	WSA	RES	CIP	BDP	PS
26 to 27	UCA	UCA	OMP	OMP	BI	PS
28	UCA	UCA	OMP	OMP	BI	TMA
29 to 31	UCA	UCA	OMP	OMP	Study	TMA
32 to 35	PP	PP	CFP	CFP	QC	TMA
36 to 37	BF	BF	Rel. Work Exp. Proj.			

Manager, Financial Institution (banking; finan. inst.)—186.118

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
20 to 22	DOO	DOO	CIP	Study	BDP	PS
23 to 25	BI	Study	CIP	Study	BDP	PS
26 to 27	CFP	CFP	OMP	OMP	Study	PS
28 to 29	CFP	CFP	OMP	OMP	PP	PP
30 to 31	BF	BF	OMP	OMP	PP	PP
32 to 33	Relevant Work Experience Projects					

Budget Officer (gov. ser.)—161.118

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
20 to 22	DOO	DOO	JD	JD	BDP	PS
23 to 25	BDS	BDS	JD	JD	BDP	PS
26 to 27	CFP	CFP	OMP	OMP	Study	PS
28 to 29	CFP	CFP	OMP	OMP	PP	PP
30 to 31	BF	BF	OMP	OMP	PP	PP
32 to 33	Relevant Work Experience Projects					

Treasurer (any ind.)—161.118

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
20 to 22	BDS	BDS	CIP	Study	BDP	PS
23 to 25	BI	Study	CIP	Study	BDP	PS
26 to 27	CFP	CFP	OMP	OMP	Study	PS
28 to 29	CFP	CFP	OMP	OMP	PP	PP
30 to 31	BF	BF	OMP	OMP	PP	PP
32 to 33	Relevant Work Experience Projects					

Direct-Mail Specialist (any ind.)—164.068

A typical program for these trainees, starting with Week 20, is shown below:

Program weeks	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	PSL	PSL	TMA	BR	BC	OM
4 to 5	EIC	EIC	TMA	UOC	BC	OM
6	EIC	EIC	TMA	FD	BC	OM
7 to 8	ER	ER	TMA	FD	FI	FI
9	ER	ER	Study	FD	FI	FI
10	ER	ER	Rel. Work Exp. Proj.			

SELECTION, GUIDANCE, AND COUNSELING

Section 104.18 (a) of the *Rules and Regulations* of the Vocational Education Act of 1963 declares that State plans for vocational education should include information on the "standards and requirements of vocational guidance and counseling services which are designed to (1) identify and encourage the enrollment of individuals needing vocational education, (2) provide the individuals with information necessary for realistic vocational planning, (3) assist them while pursuing the plan, (4) aid them in vocational placement, and (5) conduct follow-up procedures to determine the effectiveness of the vocational instruction and guidance and counseling program."

Section 104.18 (b) states that in addition to vocational guidance consultative services to be provided "the State board shall utilize the resources of the State employment service pursuant to the cooperative arrangements provided for in §104.7." Section 104.7 details the mutual sharing of information by the State employment service and the local educational agency regarding present and future prospects of employment in the community and elsewhere, and the occupational qualifications of trainees who have completed or are completing vocational education courses in schools. Community advisory committees comprising employers, employment office personnel, educators, and counselors can be used advantageously to fulfill this requirement.

To meet all these requirements and the others detailed in the State plan, the school's vocational guidance counselor must be the focal point in making information available for the selection of trainees and for giving them, their teachers, and their employers the necessary assistance to insure that trainees can obtain and retain employment, and that they can advance in their jobs.

An additional stipulation of section 104.13 (b) (2) is that each trainee will have an occupational objective which is a matter of record. This objective will be referred to as a career objective and can be a specifically recognized occupation or a cluster of closely related occupations in a given field.

These suggestions are offered to assist counselors, teachers, and others in selecting and guiding trainees. Specific State plans may detail which selection instruments, procedures, and criteria are to be used for specific occupational fields. The criteria and selection devices suggested here are those which can be considered for the occupational field covered by these curriculums.

SELECTION CRITERIA

Section 104.13 (g) (1) of the *Rules and Regulations* provides for the admission of individuals on the basis of their potential for achieving competence in the occupational field. Part (2) of this section provides for the admission of individuals to special remedial classes if these individuals have academic, socioeconomic, and other handicaps that have prevented or might prevent their success in other vocational education programs.

For the purposes of this curriculum guide, the selection standards suggested below, for trainees eligible under the Vocational Education Act of 1963, as amended, are divided into job levels and discussed separately.

A. For all job levels, as shown in *About the Curriculums*, the trainee candidate's prior academic achievement results should be evaluated with discretion. Prior academic achievement results are usually good indicators of future success in course studies. However, they should not be the sole criteria because of the possibility of "late-blooming" and because of economic, social, and other handicaps which may have influenced earlier schooling. Consideration should also be given to maturity. Those adults eligible for training under the act who have been away from school may have acquired good personal education and experience in the intervening years.

Level I jobs—The jobs in this level, on the whole, may be considered as entry jobs into the Administrative, Supervisory, and Managerial categories. Trainee applicants for these jobs should have completed high school with acceptable academic achievement or equivalent work experience. The clerical jobs in this level are of a technical nature, and in many instances, employers prefer two years of collegiate work with acceptable academic achievement.

For jobs such as Junior Executive or Trainee Manager, employers generally show a preference for recent college graduates. For most of the other jobs in this level, entry can frequently be accomplished by promotion from other jobs within an organization which provide related experience. Consideration should be given to verbal facility to deal effectively with persons at all levels; numerical facility to prepare and review various financial, statistical, and budgetary reports; ability to become familiar with one or more clerical activities; good reading comprehension and speed to obtain pertinent information; and courses of a college level in business administration.

Level II jobs—These jobs are generally of a more technical nature and at lower levels of administrative, supervisory, and managerial functions. They fall into the technical supervisory categories. Trainees for these jobs generally should have completed at least two years of college with acceptable academic achievement or equivalent work experience. In many instances, employers prefer college graduates with a background of business administration. However, promotion from within the organization is not unusual, provided the person has experience in related or equivalent work. Consideration should be given to verbal facility, both written and oral; ability to plan, formulate, and carry out programs and policies; numerical facility and an ability to understand the principles of accounting, statistics, and fiscal management; ability to relate to people in a manner to win their confidence and establish rapport; ability to understand, interpret, and apply procedures and directives; memory for detail; good reading comprehension and speed; and organizational ability to gather and evaluate facts. In the academic area, consideration should be given to completion of college level courses in the fields of business, accounting, law, psychology, sociology, and economics or the trainee's equivalent work experience in related areas. Consideration should also be given to those possessing managerial knowledge, skills, or experience.

Level III jobs—These are jobs of a high level in the Administrative, Supervisory, and Managerial categories. Preferably, trainee applicants for these jobs should have completed college with acceptable academic achievement or have equivalent work experience. Strong consideration should be given to an occupationally significant combination of organizational ability to plan, formulate, and execute policies and programs; capacity to acquire knowledge of various administrative and managerial concepts and practices, and to apply them successfully to different organizational environments; ability to relate to people in a manner to win their confidence and establish rapport; ability to motivate and direct employees and to maintain good employee-employer and good customer relationships; leadership qualities; facility with numbers to prepare and review various financial, budgetary, and material reports; and written and oral verbal facilities for effective communication. In the academic area, consideration should be given to completion of college level courses in business, financial, personnel, and industrial management. Consideration should also be given to those possessing managerial and administrative knowledge, skills, or experience, and public speaking ability.

B. Scores on aptitude tests should also be considered in selection of the applicants. Tests should be carefully chosen on the basis of their ability to discriminate between successful and unsuccessful trainees. Coefficients of validity (or determination) should be considered carefully, along with the criteria used. Standardization of the tests, along with norm group factors and extensiveness of available data and test intercorrelations, also should be considered. Tests, of course, should be only one factor in the overall evaluation of applications. The Qualifications Profile in the job definition exhibits in the section, *About the Dictionary of Occupational Titles*, should be consulted. As in the case of the educational requirements, tests for trainee applicants are suggested for each job level.

Level I jobs—Some tests suggested for use are:

1. S.R.A. Primary Mental Abilities
2. Schubert General Ability Test
3. Thurstone Test of Mental Alertness
4. Wonderlic Personnel Test
5. Wesman Personnel Classification Test
6. S.R.A. Short Tests of Clerical Ability
7. S.R.A. Clerical Aptitudes Test
8. Short Employment Tests
9. Minnesota Clerical Aptitudes Test
10. Kuder Preference Record—Vocational
11. Strong Vocational Interest Test
12. S.R.A. Survey of Interpersonal Values
13. Gordon Personal Profile
14. Gordon Personal Inventory
15. Guilford-Zimmerman Temperament Survey
16. Supervisory Inventory of Human Relations
17. Supervisory Index

Since the jobs in Level I are generally entry jobs into the Administrative, Supervisory, and Managerial categories, there is much objective information needed about the applicant trainee which can be furnished by a combination of various psychological tests. All applicant trainees for jobs in this level should be

given tests for basic mental abilities to ascertain: learning ability, analytical reasoning, planning and organizational abilities, numerical facility, and the ability to work under pressure. Tests (1) through (5) should assist counselors and teachers in securing this information. For jobs in this level requiring a knowledge of clerical skills and functions, tests (6) through (9) should appraise the trainee's basic clerical aptitudes. Insight into the trainee's vocational interest can be secured from tests (10) and (11). Information on the trainee's temperament and emotional adjustment can be secured from tests (12) through (15). For jobs of a supervisory nature, tests (16) and (17) can furnish an index of supervisory capabilities. The overall portrait or profile can also give counselors and teachers an index of potential for continued growth and development within the job as well as for progress into higher level jobs.

Level II and III jobs—Some tests suggested for use are:

1. Schubert General Ability Test
2. S.R.A. Primary Mental Abilities
3. Wonderlic Personnel Test
4. Fit or Fact—Judgment and Comprehension
5. Fit or Fact—Ingenuity
6. Watson-Glaser Critical Thinking Appraisal
7. Christenson and Guilford—Ideational Fluency
8. Concept Mastery Tests
9. Strong Vocational Interest Test
10. Kuder Preference Record—Vocational
11. Kuder Preference Record—Personal
12. Study of Values
13. Bruce's Sales Motivation
14. Gordon Personal Profile
15. Gordon Personal Inventory
16. S.R.A. Survey of Interpersonal Values
17. Guilford-Zimmerman Temperament Survey
18. Edwards Personal Preference Schedule
19. Supervisory Inventory of Human Relations
20. Supervisory Index
21. Fleishman's Leadership Opinion Questionnaire

Level II and Level III jobs are of a technical and administrative nature, some in a specific area, others covering a wider range. They are all in the Administrative, Supervisory, and Managerial categories, and in many instances the Level II job can act as a breaking-in point for a Level III job. Basically the same type of objective information could serve for both levels, with those trainees showing the greatest potential for growth and development beyond Level II jobs being considered for possible development into the Level III jobs at a future date. This helps furnish a reservoir of potential candidates for higher echelon managerial jobs.

For appraising the basic mental abilities of applicant trainees in both levels, tests (1) through (8) should provide information in the areas of: learning ability, analytical reasoning, planning and organizing abilities, numerical facility, and the ability to work under pressure. For managerial potential in Level II jobs and for managerial jobs in Level III, tests (4) through (7) can indicate the ability to think critically by drawing sound inferences, the recognition of implied assumptions, and the ability to reason logically by deduction and by interpretation. These are factors needed in most managerial jobs. Test (8) measures the ability to deal with ideas or concepts. Tests (9) through (13) can measure the applicant's interests and motivations, as well as his ability to influence others and have them accept him and his ideas. The applicant's skill in human relations and his emotional adjustment and temperament can be appraised by tests (14) through (18). For those jobs in Level II at the managerial level and for all jobs at Level III, tests (19) through (21) can indicate leadership, the ability to establish rapport and sensitivity to the feelings of subordinates, the ability to initiate ideas, and planning and directing a group toward a goal.

The profile secured by the testing program could give an index of potential for further growth and development within the job and for possible promotion, both laterally and vertically, for Level II job trainees. For Level III job trainees, it can give an index of potential for growth and development within the job.

Other tests not listed above, but which may have high validities, should also be considered; the list is not restrictive, nor is it absolute since various combinations of tests can be used so long as they will give the required objective information. Counselors selecting tests should consult the latest Mental Measurements Yearbook, various test issuing and scoring companies' catalogs, and reference works on psychological tests before deciding which tests should be used. Teachers should obtain as much professional help as possible in the area of applicant testing. The purpose of the tests is to obtain objective information about the applicant to supplement appraisals of him made during interviews. It should be appreciated that errors can be made in selection and appraisal even with good cut-off scores. The applicant's frame of mind while taking tests should also be considered when evaluating test results.

C. Applicants for Administrative, Supervisory, and Managerial positions having skills developed before

entry into the training program, and showing knowledge in various study areas, can be evaluated by using available objective tests that are used in the regular program.

The measurable skills should be compared to the standards of achievement for the particular program unit and to the occupational prerequisites for each job. The demonstrated equivalent proficiencies can then be used as a base to tailor programs for the individual trainee which will enable him to reach employable competencies without the necessity of marking time.

D. Interviewing is an essential part of the appraisal process since it offers the opportunity to feed back test scores and appraisals to that point, and it can help the applicant to decide on a career objective. Whether the interview is held non-directively or is structured, it should center on the applicant developing optimism about success in a given occupation and the productive use of his aptitudes and other assets. The decision made by the applicant regarding his career objective, and the career objective itself, should become a matter of school record. The career objective should be set before the trainee enters any program.

Counselors and coordinating teachers should also consider that success in a given field may be achieved by persons of different interests and abilities. Obvious evidences of possible failure in a given occupational choice, because of lack of aptitude in the most requisite skills, should be carefully considered during both appraisal and subsequent interviews.

AFTER ENROLLMENT

After a trainee has been selected for the program, periodic counselor-teacher-trainee conferences should be scheduled. Effort should be made to uncover problems that may hinder the success of the trainee in his studies, and necessary remedial study should be offered. Throughout the program, teachers should advise counselors about the progress the trainee is making toward attaining required skills and knowledges for employment.

EVALUATION AND REPORTING

Counselors should continually assess the value of the program, in terms of adequate vocational preparation of accepted trainees, and should suggest changes in curriculum content to strengthen individual programs.

TAILORING PROGRAMS

Individuals who demonstrate certain achievements can be "slotted" into regular programs, both basic and specialized. This requires a certain degree of flexibility of scheduling. Advice on special needs of individuals should be given to the trainee's teachers.

RECORD OF COMPLETION

After completing or leaving a course of study, each trainee should receive a Record of Completion. The record should not only reflect the skills and knowledges attained during the program, but it should also indicate exhibited skills for which no unit of study was incorporated into the program. If the tailored program included a unit to advance the development of exhibited skills and knowledge, and the unit was not studied because of the lack of available time, no recording should be made about that unit in the Record. All reports of skill knowledge for the various subject units of study should be made by the administrator's office at the time of exit or upon completion of the program by the trainee. The school office should maintain a folder for each trainee which contains the employability evaluations made for every unit of study. It is further suggested that the school maintain at least two copies of the Record for transcript and reference purposes. If the form is standardized within a particular State, trainees moving from one school to another should be asked to submit (for the record) their Record of Completion. Achievement in studies at the new school(s) should be entered in the Record. A suggested sample record is illustrated.

STATE OF _____
RECORD OF COMPLETION OF ADMINISTRATIVE AND SUPERVISORY OCCUPATIONS EDUCATION

(Under The Vocational Education Act of 1963 or Manpower Development and Training Act)

TRAINEE'S NAME:_____ TRAINING PROGRAM:_____

SCHOOLS ATTENDED:_____

SKILLS

Fundamentals of Interviewing_____

Public Speaking_____

Basic Training Methods and Practices_____

Business Correspondence_____

Forms Design_____

Procedures Writing_____

Induction and Orientation of Employees_____

Indexing and Filing Practices_____

Office Machines—Computing and Duplicating_____

Job Descriptions, Specifications, and Evaluation_____

Calculating Costs and Prices_____

Employee Appraisal and Counseling_____

Business Data and Statistics_____

Material Specifications_____

BASIC SUBJECT AREAS (Teachers' Evaluation)

Business Reports_____

Records Management_____

Introduction to Bids and Contracts_____

Effective Interpersonal Relations_____

Problem Solving Techniques_____

Production Control Boards and Charts_____

Production Reports, Estimates and Schedules_____

Quality Control Practices_____

Time and Motion Economy_____

Work Simplification_____

Payroll and Employee Tax Records_____

Inventory Control Practices_____

SPECIALIZED SUBJECT AREAS (Teachers' Evaluation)

Performance Standards_____

Techniques of Marketing and Advertising_____

Introduction to Business Data Processing_____

Traffic Management_____

Union Contract Administration_____

Shipping Regulations and Procedures_____

Business Contract Law_____

Corporate Insurance Practices_____

Business Forecasting_____

Budgeting_____

Business Investments_____

ADMINISTRATIVE AREAS (Teachers' Evaluation)

Principles of Effective Supervision_____

Wages and Salary Administration_____

Effective Internal Communications_____

Personnel Policies_____

Public and Community Relations_____

Developing Organizational and Operational Objectives_____

Use of Consultants_____

Business Principles and Organization_____

Business Economics_____

Corporate Financial Planning and Control_____

Organizational and Manpower Planning_____

ATTESTATION

PRINCIPAL_____ PRINCIPAL_____

SCHOOL ADMINISTRATOR_____ SCHOOL ADMINISTRATOR_____

DATE_____ DATE_____

Suggested Record of Completion Form

GENERAL OFFICE EDUCATION UNITS

General office education units are those studies common to many jobs in the occupational field. The studies should help the trainee develop:

1. *Basic skills* such as interviewing, public speaking, communication, and correspondence.
2. *Functional knowledge requirements* such as employee appraisal and counseling, problem solving, and records management.
3. *Environmental knowledge* concerning the occupational area in which he will be working.

Local or State requirements for general education courses at secondary or postsecondary school levels have not been included in this guide.

ACCELERATED READING (AR)

Remedial Unit for Trainees as Required

Hours Class: 1 hour daily — Total: 50 hours variable

Description and Teaching Suggestions

This skill unit will increase the trainee's reading ability, enabling him to comprehend business and technical materials more rapidly. An efficient worker should be able to process written materials with maximum speed and accuracy. Increased reading skill is one of the key factors in achieving this goal. Stress will be placed on visual discrimination, development of comprehension, and rapid reading techniques. Each trainee should enter the program with at least a 10th-grade reading level as measured by the Davis Reading Test, Forms 2A, 2B, 2C, or 2D. Trainees not at that level should receive a preunit remedial reading course to bring them to that level. Trainees will receive group instruction and will work with individualized materials so that each may proceed in accordance with his own natural ability.

Standards of Achievement

Reading at 12th-grade level, as measured by the Davis Reading Test, Forms 1A, 1B, 1C, or 1D, plus special proficiency in one or more of the following areas:

Correspondence
General business literature
Legal material
Medical reports
Scientific reports
Engineering data

At present, there are no standard tests of achievement in the above categories. Thus, reading instructors should develop specialized measuring tools to determine the degree of achievement attained by the trainee.

Prerequisites for Study of Accelerated Reading

Need as determined by the teacher.

Topic Outline

I. Visual Discrimination
II. Fundamental Approach to Reading
III. Vocabulary Development
IV. Sentence and Paragraph Comprehension
V. Comprehension of Longer Selections
VI. Accelerating Reading
VII. Practical Applications

TOPIC I. VISUAL DISCRIMINATION

A. Tachistoscopic training
   1. Numbers
   2. Words
   3. Phrases
B. Practical applications to business correspondence

TOPIC II. FUNDAMENTAL APPROACH TO READING

A. Need for flexibility
B. Surveying
C. Skimming

D. Scanning
E. SQ3R method (Survey, Question, Read, Review, Recite)

TOPIC III. VOCABULARY DEVELOPMENT

A. Learning words in context
B. Using the dictionary
C. Word roots
D. How to be "word aware" in everyday life
E. Building vocabulary artificially through special texts

TOPIC IV. SENTENCE AND PARAGRAPH COMPREHENSION

A. Structure of a sentence
B. Structure of a paragraph

TOPIC V. COMPREHENSION OF LONGER SELECTIONS

A. Determining author's purpose and general tone
B. Recognizing and understanding the writer's organization
C. Finding main ideas
D. Finding supporting details
E. Following written directions
F. Relating ideas, drawing inferences, and reading between the lines

TOPIC VI. ACCELERATING READING

A. Understanding factors that control speed
   1. Difficulty of the material
   2. Purpose of the reader
   3. Intelligence
   4. Span of comprehension
   5. Concentration
   6. Mechanical factors (orderly left-to-right progression, accurate perception, etc.)
B. Rate-controller training
C. Timed exercises
D. Pacer training

TOPIC VII. PRACTICAL APPLICATIONS

A. Applications to general reading
B. Applications to specific areas

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select teacher materials for use in this unit. Additional materials are listed in appendix D.

BLAIR, GLENN. *Diagnostic and Remedial Teaching.* New York: Macmillan, 1956.

BOND, GUY AND TINKER, MILES. *Reading Difficulties, Their Diagnosis and Correction.* New York: Appleton-Century-Crofts, 1957.

FLESCH, RUDOLPH. *The Art of Readable Writing.* New York: Harper & Bros., 1949.

JEWETT, ARNO. *Improving Reading in the Junior High School. (Bulletin No. 10).* Washington: U.S. Department of Health, Education, and Welfare, 1957.

KOTTMEYER, WILLIAM. *Teacher's Guide for Remedial Reading.* New York: McGraw-Hill, 1959.

NEWTON, J. ROY. *Reading in Your School.* New York: McGraw-Hill, 1960.

STRANG, RUTH AND BRACKEN, DOROTHY. *Making Better Readers.* Boston: D. C. Heath Co., 1957.

STRANG, RUTH; MCCULLOUGH, CONSTANCE; AND TRAXLER, ARTHUR. *The Improvement of Reading, 3rd ed.* New York: McGraw-Hill, 1961.

Mechanical Aids

AVR Rateometer. Audio-Visual Research, Chicago. A device for improving reading speed.

Controlled Reader. Educational Developmental Laboratories, Inc., New York. A machine which uses filmstrips for improvement of reading (readiness period through fault level).

Keystone Tachistoscope. Keystone View Company, Meadville, Pa. A device for presenting digits, phrases, sentences, affixes, etc. (timed or untimed), by use of slides.

Leavell Hand-Eye Coordinator. Keystone View Company, Meadville, Pa. Offers training in hand-eye coordination.

Perceptascope. Perceptual Development Laboratories, St. Louis. Combines training with films and training in tachistoscopic techniques.

Reading Pacer. Keystone View Company, Meadville, Pa. A device for improving reading speed.

Reading Rate Controller. Stereo Optical Company, Chicago. A device for improving reading speed.

Renshaw Tachistoscopic Trainer. Stereo Optical Company, Chicago. An individual tachistoscope.

Shadowscope Reading Pacer. Lafayette Instrument Company, Lafayette, Ind. A device for improving reading speed.

SRA Reading Accelerator, Model II. Science Research Associates, Chicago. A device for improving reading speed.

Timex. Educational Development Laboratories, Inc., New York. A tachistoscopic device.

ORAL COMMUNICATION (OC)

Remedial Unit for Trainees as Required

Hours Class: 1 hour daily — Total: Minimum 15 hours variable

Description and Teaching Suggestions

This unit is designed to assist those trainees who evidence speech difficulties or defects. Teachers should allocate time to work with each trainee in accordance with individual speech needs. The extent of after-hours trainee practice should vary as necessary. The trainee should show evidence of a gradual progression to levels of acceptable fluency as he continues in this remedial unit. Since progress in speech development may vary among trainees, some may be released from the unit earlier than others.

The topic outline forms a general guide only and should be tempered by the speech teacher's observation of the trainee's progress. Characteristic regional differences should be noted. Tape recordings of individuals' conversations and practice exercises should be used along with case study and with role playing in business situations requiring effective oral communication. Oral reports and practice exercises should be used liberally. Help with organization of individual talks should also be given to further develop trainee potential. The importance of good oral communication in the business setting, with its requirements of clarity and coherence, should be highlighted constantly.

Standards of Achievement

Acceptable speech and conversation as judged by the teacher.

Prerequisites for Study of Oral Communication

Need as determined by the teacher.

Topic Outline

I. Speech Problems
II. Elements of Good Speech
III. Development of Fluency
IV. Practice Business Conversations
V. Speaking in Meetings

TOPIC I. SPEECH PROBLEMS

A. Individual analysis
B. Correction program
   1. Clinic
   2. After-school assignments
   3. Practice exercises

TOPIC II. ELEMENTS OF GOOD SPEECH

A. Voice
   1. Volume
   2. Rate
   3. Pitch
   4. Tone
   5. Inflection
B. Using the voice
   1. Pronunciation
      a. Diacritical marks
      b. Difficult words
      c. Regional problems
   2. Enunciation
   3. Breath control
   4. Diction
   5. Animation
C. Practice exercises in above

TOPIC III. DEVELOPMENT OF FLUENCY

A. Importance of fluency
B. Importance of word choice
C. Using language
   1. Expanding vocabulary
   2. Eliminating slang
   3. Using correct grammar
   4. Developing units of thought
   5. Organizing oral presentations
D. Practice exercises in above

TOPIC IV. PRACTICE BUSINESS CONVERSATIONS

Note: Dual and multiple role playing should be used to simulate office conditions of conversation.

A. The role of the listener
   1. Participating with speaker
   2. Questioning
   3. Interpreting
   4. Indicating interest
B. The role of the speaker
   1. Organizing talk
   2. Evidencing clarity and coherence
   3. Stating facts and details accurately
   4. Speaker attitudes toward listener

TOPIC V. SPEAKING IN MEETINGS

A. Types of meetings
B. Understanding purpose or objective

C. Participating actively when appropriate
D. Recognizing others
E. Stating conclusions
F. Practice in speaking in group meetings

Texts and Other Teaching Materials

Selection of appropriate materials for this course will vary depending on trainee problems and the teacher's familiarity with speech correction. Several good tape recorders should be available for the classroom.

BAIRD, A. CRAIG, AND KNOWER, FRANKLIN H. *Essentials of General Speech, 2nd ed.* New York: McGraw-Hill, 1960.

HIMSTREET, WILLIAM C.; PORTER, LEONARD J.; AND MAXWELL, GERALD W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

THOMPSON, WAYNE AND FESSENDEN, SETH. *Basic Experiences in Speech, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1958.

BUSINESS CORRESPONDENCE (BC)

Basic Skill for: All Trainees EXCEPT: Clerical Technician, File Service Worker, Process-Description Writer, Safe Deposits Manager, General Foreman, Interviewer and Claims Adjuster

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to provide trainees with the basic skills required to write well-organized letters and routine correspondence for a variety of purposes.

The emphasis of the unit should be placed on development of writing skill and on familiarization with typical business writing. The first goal includes developing a forceful and pleasing style as well as grammatical correctness. Achieving the second goal requires some knowledge of business practices and relationships. In addition to applying basic language skills, the trainees should be introduced to current trends in business writing, specific techniques for developing a readable style, and the fundamentals of organizing written materials.

Some mechanical aspects that should be reviewed are format, punctuation and capitalization, and continuing vocabulary development.

Developing an effective writing style is probably learned best by a combination of activities, such as analyzing successful business writing, composing original letters, studying the feedback after evaluation, revising and rewriting, and repeated application of techniques that have proved successful.

Where possible, it is desirable that all writing assignments be typewritten. Bulletin boards should be used to display various letterheads, enlarged posters of letter styles, and outstanding compositions. Trainees mastering this unit may also be eligible to pursue related work activities. Assessment of a trainee's achievement in this unit is qualitative, based on the judgment of the teacher.

Standards of Achievement

Organize and compose acceptable business correspondence in accordance with current business letter writing practice.

Prerequisites for Study of Business Correspondence

Trainee selection standards.

Topic Outline

I. Elements of Letter Organization
II. Letter Style
III. Special Purpose Letters
IV. Application for Employment
V. Intracompany Correspondence

Note: Each subtopic should be followed by exercises in original letter writing with teacher-trainee feedback, and rewriting of letter by the trainee for resubmission.

TOPIC 1. ELEMENTS OF LETTER ORGANIZATION

A. Developing unified and coherent paragraphs
B. Developing conciseness
    1. Letters of request
        a. Information concerning individual employees
        b. Training schedules
        c. Insurance information—coverages, rates, etc.
        d. General and/or specific information
C. Developing completeness and accuracy
    1. Maintenance of conciseness

2. Letters of request
   a. Transportation space availability
   b. Ordering catalogs, brochures, references, etc.
   c. Scheduling a meeting or program
   d. Requesting assistance
   e. Requesting specific information

TOPIC II. LETTER STYLE

A. Pleasant and persuasive tone
B. Descriptive style
   1. Vivid
   2. Concrete
C. Letters to build good will
   1. Thanks
   2. Congratulations
   3. Appreciation
   4. Granting a favor
   5. Formal letters with deferential tone to important person
   6. Recommendations for use of specific services

TOPIC III. SPECIAL PURPOSE LETTERS

A. Letters that promote service
   1. Organization to lead the reader to action
   2. Maintenance of previously developed style
B. Letters containing negative material or rejection
   1. Maintenance of positive tone
   2. Awareness of reader reaction
   3. Saying "No" graciously

TOPIC IV. APPLICATION FOR EMPLOYMENT

A. Inquiring about an open position
B. Applying for a specific position

TOPIC V. INTRACOMPANY CORRESPONDENCE

A. Informal memoranda for staff members
   1. Brief
   2. Concise
   3. Courteous
B. Writing for the record
   1. Formal and impersonal style
   2. Summaries of meetings and programs
   3. Orders to subordinate personnel

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D. See also Business Reports unit.

AURNER, DR. ROBERT R. AND BURTNESS, DR. PAUL S. *Effective English for Business, 5th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, and Manual.

BUCKLEY, E. *How To Increase Sales with Letters.* New York: McGraw-Hill, 1960.

FOWLER, H. W. *A Dictionary of Modern English Usage.* New York: Oxford University Press, current edition.

HIMSTREET, WILLIAM C.; PORTER, LEONARD J.; AND MAXWELL, GERALD W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

HODGES, JOHN C. AND CONNOLLY, FRANCIS X. *Harbrace College Handbook, 5th ed.* New York: Harcourt, Brace, and World, 1962.

LARSON, LENNA A. AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1960.

MENNING, J. H. AND WILKINSON, C. W. *Communication Through Letters and Reports, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1963.

PARKHURST, C. C. *Business Communication for Better Human Relations, 7th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

REID, JAMES M. AND WENDLENGER, ROBERT M. *Effective Letters.* New York: McGraw-Hill, 1964.

SHIDLE, NORMAN G. *The Art of Successful Communication.* New York: McGraw-Hill, 1965.

SHURTER, R. L. AND WILLIAMSON, J. P. *Written Communication in Business, 2nd ed.* New York: McGraw-Hill, 1964.

BUSINESS DATA AND STATISTICS (BDS)

Basic Knowledge for: Bank Cashier, Chief Clerk, Clerical Technician, Credit Union Supervisor, Junior Executive, Purchase-Price Analyst, Safe Deposits Manager, Trainee-Manager, Administrative Assistant, Branch Manager, Budget Officer, Treasurer, General Foreman, Procurement Services Supervisor, Insurance Office Manager

Hours Class and/or Laboratory: 2 hours daily — Total: 30 hours

Description and Teaching Suggestions

Trainees will be introduced to the general subject of statistics and familiarized with the application of statistical methods to the preparation of data. The frequent use of examples is suggested to clarify and illustrate the proper use of various statistical methods and tools. Completed statistical forms and reports

using data in the form of tabulations, ratios, and index numbers should be employed liberally. Practice sessions involving the preparation of graphs from data should be emphasized. Laboratory time should provide opportunities for trainees to study and analyze statistical examples. The teacher may also wish to assign typical problem situations to trainees for analysis and development of appropriate statistics to support the analysis. At least two examinations are suggested to permit the teacher to evaluate progress and identify areas of weakness.

Standards of Achievement

1. Use selected statistical terminology correctly.
2. Demonstrate ability to understand and apply basic statistical concepts and methods to the development and interpretation of studies.
3. Be able to construct graphs based on statistical data.
4. Demonstrate knowledge of statistical tools, such as coefficients of correlation, ratios, measures of central tendency, etc.

Prerequisites for Study of Business Data and Statistics

Trainee selection standards. Trainee should have an adequate mathematics background.

Topic Outline

I. Introduction to Statistics
II. Sampling
III. Tabulation and Presentation of Statistical Data
IV. Variability
V. Measures of Central Tendency
VI. Correlation
VII. Index Numbers
VIII. Statistical Decisionmaking

TOPIC I. INTRODUCTION TO STATISTICS

A. Definitions
  1. Statistics—descriptive
  2. Statistical method—inductive
B. Managerial statistics

TOPIC II. SAMPLING

A. Purpose and characteristics
B. Criteria for use
  1. Validity
  2. Advantages and disadvantages
  3. Size of sampling
  4. Types of selection
    a. Random sampling
    b. Stratified random sampling
    c. Cluster sampling
  5. Cost
  6. Time
C. Sources of data
  1. Primary
  2. Secondary
  3. Public
  4. Private

TOPIC III. TABULATION AND PRESENTATION OF STATISTICAL DATA

A. Principles
B. Organizing data
C. Arrays
D. Graphical presentation
  1. Types
  2. Histograms
  3. Pictograms
  4. Frequency polygons
  5. Cumulative distributions and ogives

TOPIC IV. VARIABILITY

A. Need for describing variability
  1. In planning
  2. In interpreting data
  3. In decisionmaking
B. Standard deviation
  1. Significance
  2. Application
C. Variance
D. Probability

TOPIC V. MEASURES OF CENTRAL TENDENCY

A. Mean
  1. Definition
  2. Application and use
  3. Computation
B. Median
  1. Definition
  2. Application and use
  3. Computation
C. Mode
  1. Definition
  2. Application and use
  3. Computation
D. Scales—application and use
  1. Nominal
  2. Ordinal
  3. Interval
  4. Ratio

E. Standard scores
F. Normalized standard scores
G. T scores

TOPIC VI. CORRELATION

A. Definition
B. Measures of relation
   1. Reliability and validity
   2. Temporal stability
   3. Errors of variance
C. Methods for measuring and fitting
   1. Rank order correlation coefficient
   2. Pearson Product Moment
   3. Split-half reliability
   4. Least mean squares method
D. Significance levels
E. Range for plus 1 to minus 1
F. Standard error of measurement
G. Standard error of the difference
H. Practice in using least mean squares for wage curves, etc.

TOPIC VII. INDEX NUMBERS

A. Definition
B. Need for index numbers
C. Types of index numbers
   1. Simple
   2. Composite
   3. Weighted
D. Price indexes and their application
   1. Purchasing power of the dollar
   2. Real wages
   3. Escalator clauses in labor-management agreements

TOPIC VIII. STATISTICAL DECISIONMAKING

A. Decisionmaking in general
B. Decision theory
C. Base rates
D. Multiple cutoff scores
E. Differential validity
F. Concept of statistical significance—decision rules
G. Use of statistical decisions
   1. Provides basis for action
   2. Alternatives and rational means of selection
   3. Design for management decision

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ANASTASI, ANNE. *Psychological Testing, 2nd ed.* New York: Macmillan Co., 1961.

BOWEN, EARL K. *Statistics.* Homewood, Ill.: Richard D. Irwin, Inc., 1960.

CHRUDEN-SHERMAN. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 1963.

GUTHRIE, HAROLD W. *Statistical Methods in Economics,* Homewood, Ill.: Richard D. Irwin, Inc., 1966.

HANSON AND BRABB. *Managerial Statistics, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

HOUSEHOLDER, JAMES E. *Introduction to the Statistical Method.* New York: Alfred A. Knopf, 1962.

KAZMIER, L. J. *Statistical Analysis for Business and Economics.* New York: McGraw-Hill, 1967.

LEABO, D. A. AND SMITH, C. FRANK. *Basic Statistics for Business and Economics.* Homewood, Ill.: Richard D. Irwin, Inc., 1964.

SCHLAIFER, ROBERT. *Introduction to Statistics for Business Decisions.* New York: McGraw-Hill, 1961.

U.S. Department of Labor. *Economic Indicators Prepared for the Joint Economic Committee by the Council of Economic Advisers.* Washington: U.S. Government Printing Office, current edition.

———. *Monthly Labor Review.* Washington: U.S. Government Printing Office, current edition.

BUSINESS ECONOMICS (BE)

Environmental Knowledge for: Bank Cashier, Junior Executive, Purchase-Price Analyst, Trainee Manager, Administrative Assistant, Branch Manager, Chief Credit Analyst, General Foreman, Procurement Services Supervisor, Purchasing Agent, Trust Officer, Budget Officer, Contract and Order Administrator, Financial Institution Manager, Industrial Organization Manager, Treasurer, Title Clerk

Hours Class: 2 hours daily — Total: 80 hours

Description and Teaching Suggestions

Throughout all levels of management, an understanding of economic principles is essential in order that decisions will be consonant with sound business and economic practice. A knowledge of the origins and development of economic systems, with emphasis on a free economy and the American business system, will be imparted to trainees. Care should be exercised by the teacher to maintain objectivity and minimize

bias in the presentation of factual data. In this way, trainees will become familiar with the underlying principles of a free enterprise economy and will establish a base for objective comparison of the advantages and disadvantages of other economic systems. Each trainee should develop the capability for evaluating proposals for changes in our system in terms of positive and negative effects.

To maintain dynamism and stimulate trainee interest and participation, debate and guided discussion should be actively encouraged by the teacher. Audio-visual aids and role-playing are effective tools in telling the story of free enterprise and should be utilized to supplement lecture and study assignments. It is also suggested that teachers assign trainees extensive readings in the economics field, and require written reports and oral classroom presentations. Evaluation of trainee progress should be made through objective tests, essays, and special reports.

Standards of Achievement

1. Exhibit understanding of the major economic systems (in oral or written presentation) and on the relationship between economic and political freedom.
2. Write a paper on the underlying differences of collective versus private ownership of industrial facilities (buildings, equipment, and tools).
3. Make a report on the methods advocated by Communists to obtain control of power in a free economy, compared with Socialist means to achieve the same result.
4. Prepare a panel discussion on the subject of the proper functioning of government in the control of national economic affairs.
5. Explain the system of checks and balances exerted in a free economy by each individual in his triple role of customer, owner, and worker.
6. Prepare a 100-year survey chart of the advancement of the American people under capitalism. Include population increases, inventions, work hours, usable raw materials, education, investment per worker, and any other pertinent factors.
7. Prepare a report on job opportunities now available in the community due to technological change for jobs not in existence 50 years ago.
8. Explain "competition" in terms of (1) seller's competition and (2) buyer's competition. Show the impact of each on the market place.

Prerequisites for Study of Business Economics

At least 2 years of college training or equivalent.

Topic Outline

I. Introduction
II. Basic Concepts
III. Systems Comparison
IV. The American Business System
V. Competition in a Free Economy
VI. Growth and Upgrading of Living Standards
VII. Individual Freedom and the Economic System
VIII. Interdependence of World Economic Groups

TOPIC I. INTRODUCTION

A. Definition of "economics"
   1. What it is
   2. What it is not
B. Origins of an economic society
   1. Individual wants and methods for satisfying them
   2. "Tribal" or group activity
   3. Development of group interdependence (from the manor to the town; municipal regulation of commerce)
   4. Emergence of national economic systems
C. The impact of technology on an economic system
   1. The individual tradesman or artisan
   2. The growth of the factory system (the English industrial revolution)
   3. Mass production and its effect on the individual

TOPIC II. BASIC CONCEPTS

A. The division of labor
B. The principle of marginal utility
C. Choice and limitation
D. Wealth
   1. What constitutes wealth
   2. Wealth and money
E. Personal liberty as a cornerstone of a free economy

TOPIC III. SYSTEMS COMPARISON

A. Overview of major world economic systems
   1. Socialism
      a. Karl Marx and Friedrich Engels; The Communist Manifesto of 1848
      b. Das Kapital
      c. The philosophy of "From each according to his ability, to each according to his needs."
      d. The class struggle
      e. Trends of capitalist development

f. The Fabian Society and John Maynard Keynes
g. The growth of socialism in the United States

2. Communism
   a. The Marxist basis of Communistic theory
   b. Bolshevism and its philosophic diversion from socialism
   c. Communism and the Soviet government
   d. The Communist organization
      (1) Internally
      (2) Internationally
   e. Planned economy
      (1) Capital formation
      (2) Efficiency
   f. Plans for extension of Communism
3. Fascism
   a. Historical background
   b. Major doctrines
   c. Political and social life in a fascist economy
   d. Basic differences
      (1) Fascism vs. Socialism
      (2) Fascism vs. Communism
4. Free enterprise (capitalism)
   a. Definition of economic freedom
   b. Foundations
      (1) Personal liberty
      (2) Private property
      (3) Individual initiative
   c. National growth

B. Summation of differences

TOPIC IV. THE AMERICAN BUSINESS SYSTEM

A. Structure and operation
   1. Incentive for engaging in business
   2. Sources of income
   3. Shareholders and their role in establishing a business
   4. Capital investment in facilities
   5. Administrative areas
   6. Problems of executive management
      a. Replacement of facilities
      b. Payments to support activities
      c. Wages and salaries
   7. Profit
      a. Gross
      b. Net
      c. Reserve
      d. Dividends
   8. Taxes
      a. Necessity for paying
      b. Effects of increased taxation
   9. New product development
      a. Patent laws
      b. Copyrights
   10. Customer preferences
      a. Determinants
      b. Transfer of patronage

B. Summation of individual's triple role in a free economy
   1. Owner
   2. Worker
   3. Customer

TOPIC V. COMPETITION IN A FREE ECONOMY

A. The impetus in free enterprise
B. Supply and demand
C. Competition and enterprise efficiency
   1. Volume
   2. Unit cost
   3. Selling price
   4. Improvement in equipment, tools, and facilities
D. The "Law of Price"
E. Prices and wages
F. The customer as a real profit-maker
G. Government-controlled industries and their effect on the free market

TOPIC VI. GROWTH AND UPGRADING OF LIVING STANDARDS

A. 100-year experience period
   1. Population growth
   2. Level of education
   3. Patents
   4. Workday and workweek hours
   5. Leisure time
   6. Real wages
   7. Usable raw materials
   8. Capital investment in facilities per worker
   9. Total working population
   10. Gross national product and services
B. Summation and forecast of living standard trend

TOPIC VII. INDIVIDUAL FREEDOM AND THE ECONOMIC SYSTEM

A. Historical basis in Bill of Rights
B. Comparison of differences in freedoms enjoyed under
   1. Socialism
   2. Fascism
   3. Communism
C. Effect of changes in economic system on individual freedoms

D. Disturbances of economic equilibrium
   1. Division of labor
   2. Migration
   3. Advances in technology
   4. Wars and political unrest
   5. Instability of the world outside the system
   6. The "overproduction bogey-man" and world living standards
   7. The human fallibility factor
E. Stabilization of the system
   1. Inflation versus deflation
   2. Harmonization of savings and investments

TOPIC VIII. INTERDEPENDENCE OF WORLD ECONOMIC GROUPS

A. Mutual well-being
B. World trade
C. Methods of promoting economic cooperation

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

American Enterprise Economy, The. (Booklet series.) Washington: Chamber of Commerce of the United States, 1955.

BELKNAP, JOEL R. *The Story of Free Enterprise.* New York: Devin-Adair, 1963.

DODD, JAMES H.; KENNEDY, JOHN W.; AND OLSEN, ARTHUR R. *Applied Economics, 6th ed.* Cincinnati: South-Western, 1962. Workbooks, Achievement Tests and Manual.

FAIRCHILD, FRED R.; BUCK, NORMAN S.; AND SLESINGER, REUBEN E. *Principles of Economics.* New York: Macmillan, 1954 (5th printing. 1960).

FAIRCHILD, FRED R. AND SHELLY, THOMAS J. *Understanding Our Free Economy, 3rd ed.* Princeton, N.J.: D. Van Nostrand Co., 1962.

GOODMAN, KENNARD E. AND HARRISS, C. LOWELL. *Economics.* Boston: Ginn and Co., 1963.

HALLSTONES, THOMAS J.; MARTIN, BERNARD L.; AND WING, GEORGE A. *Contemporary Economic Problems and Issues.* Cincinnati: South-Western, 1966.

HURWITZ, HOWARD L. AND SHAW, FREDERICK. *Economics in a Free Society.* New York: Oxford Book Co., 1964.

LINDHOLM, RICHARD W. AND DRISCOLL, PAUL. *Our American Economy, 2nd ed.* New York: Harcourt, Brace, and World, 1964.

MORTONSON, WILLIAM P.; KRIDER, DONALD T.; AND SAMPSON, ROY J. *Understanding Our Economy.* Boston: Houghton Mifflin, 1964.

NANASSY, LOUIS C. AND FANCHER, CHARLES M. *General Business and Economics Understandings, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

PRICE, RAY, ET AL. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966. Text, Student Activity Guides 1 and 11 with tests, Teacher's Source Book and Key.

ROEPKE, WILHELM. *Economics of the Free Society.* Chicago: Henry Regnery Company, 1963.

SMITH, AUGUSTUS H. *Economics for Our Times, 3rd ed., rev.* New York: McGraw-Hill, 1963.

WILSON, HARMON AND EYSTER, ELVIN S. *Consumer Economic Problems, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

WRONSKI, STANLEY P.; DOODY, FRANCIS S.; AND CLEMENCE, RICHARD V. *Modern Economics.* Boston: Allyn and Bacon, 1964.

BUSINESS PRINCIPLES AND ORGANIZATION (BPO)

Environmental Knowledge for: Insurance Office Manager, Junior Executive, Trainee Manager, Branch Manager, General Foreman, Administrative Assistant, Office Manager

Hours Class: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

This unit should help the trainee to understand the role of the American business system, its organization, and some basic management principles. The content is designed to give the trainee an awareness of his job relative to others in an organizational complex. The role and importance of information communication and all types of production activities in our business system are stressed.

Trainees should become aware of the complexities of today's business environment and understand business decision guidelines such as profit, costs, overhead, production, and administrative expense. The various production progress communications functions should be explored since many trainees may find employment in these areas.

The unit also covers the financial and personnel management areas of business enterprise and the general role of government. It is suggested that representatives from local business organizations be invited to speak to the group about areas of interest. Class discussion should be encouraged. Objective tests can be used to evaluate the trainee's general business knowledge.

Standards of Achievement

1. Know the types of organizations in the American business system.
2. Know the general patterns of operation and the general responsibilities of management for profitable production.
3. Identify and know basic information communication functions and their role in moving goods and providing services.
4. Know the purposes and contribution to organizations of information, production, and personnel management.

Prerequisites for Study of Business Principles and Organization

Trainee selection standards.

Topic Outline

I. Understanding the American Business System
II. Organization of Business
III. Principles of Management
IV. Marketing and Merchandising Management
V. Financial Management
VI. Production Management
VII. Personnel and Human Relations
VIII. Government and Business

TOPIC I. UNDERSTANDING THE AMERICAN BUSINESS SYSTEM

A. The profit motive
B. Big and small business
C. Interdependency and specialization
D. The business system in a democratic society
E. Governmental influence

TOPIC II. ORGANIZATION OF BUSINESS

A. Sole proprietorship
B. Partnership
C. Corporation
D. Cooperatives

TOPIC III. PRINCIPLES OF MANAGEMENT

A. Overall responsibilities of management
B. Organization of management
C. Patterns of operation
   1. Planning
   2. Organizing
   3. Directing
   4. Integrating
   5. Controlling
D. Executives responsible for management functions

TOPIC IV. MARKETING AND MERCHANDISING MANAGEMENT

A. Role of marketing in our business system
B. Importance and growth of marketing
C. Factors affecting marketing activities
   1. Population trends
   2. Income
   3. Location
   4. Style
   5. Fashion
D. Marketing research and information communication as important functions of marketing
E. Channels of distribution
   1. Wholesalers
   2. Agents and brokers
   3. Retailers
F. Marketing activities
   1. Buying
   2. Pricing
   3. Selling
G. Merchandising activities
   1. Promotion—advertising and display
   2. Delivery and shipping
   3. Quality and efficiency of services

NOTE: Point up need for planning and controlling these functions and the importance of accurate progress reports to executives.

TOPIC V. FINANCIAL MANAGEMENT

A. Executives and financial responsibility
B. Communicating financial decisions and policies
C. Areas of financial management
   1. Financial accounting
   2. Determination of profits
   3. Determination and control of costs
   4. Budgeting
   5. Taxes and their impact on business
   6. Investments
   7. Risks and insurance
   8. Credit and collections

TOPIC VI. PRODUCTION MANAGEMENT

A. Executives and departmental responsibilities
B. Planning production
C. Production control and measurement (See Production Control Boards and Charts Unit)
D. Factors of production

TOPIC VII. PERSONNEL AND HUMAN RELATIONS

A. Executives and departmental responsibilities
B. Recruitment and selection
C. Employee training
D. Employee incentives
   1. Financial
   2. Nonfinancial
E. Employer-employee relations
F. Office organization and management

TOPIC VIII. GOVERNMENT AND BUSINESS

A. Important areas of government legislation
   1. Prices
   2. Business practices
   3. Fluctuations
   4. Regulations—public utilities, institutions, insurance, etc.
B. Encouragement of business activity

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

APPLEWHITE, PHILIP B. *Organizational Behavior.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

CRABBE, ERNEST H.; DEBRUM, S. JOSEPH; AND HAINES, PETER G. *General Business, 9th ed.* Cincinnati: South-Western, 1968. Workbooks, Achievement Tests, and Manual.

DAVIS, K. AND BLOMSTROM, R. L. *Business and Its Environment.* New York: McGraw-Hill, 1966.

KEITH, L. A. AND GUBELLINI, C. E. *Introduction to Business Enterprise.* New York: McGraw-Hill, 1962.

MCGUIRE, J. W. *Business and Society.* New York: McGraw-Hill, 1963.

NANASSY, LOUIS C. AND FANCHER, CHARLES M. *General Business and Economic Understandings, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

PRICE, RAY G.; MUSSELMAN, VERNON A.; HALL, J. CURTIS; AND WEEKS, EDWIN. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

ROBINSON, EDWIN AND HALL, J. CURTIS. *College Business Organization and Management, 3rd ed.* New York: McGraw-Hill, 1964.

SHILT, BERNARD A. AND WILSON, W. HARMON. *Business Principles and Management, 4th ed.* Cincinnati: South-Western, 1961.

TONNE, HERBERT A.; SIMON, SIDNEY I.; AND MCGILL, ESBY C. *Business Principles, Organization and Management, 2nd ed.* New York: McGraw-Hill, 1963.

BUSINESS REPORTS (BR)

Specialized Skill for: Bank Cashier, Chief Clerk, Clerical Technician, Credit and Collection Manager, Credit Union Supervisor, Insurance Office Manager, Junior Executive, Office Manager, Purchase-Price Analyst, Title Clerk, Trainee Manager, Branch Manager, Chief Credit Analyst, Operations Officer, Trust Officer, Contract and Order Administrator, General Foreman, Administrative Assistant, Procurement Services Supervisor, Tariff and Schedules Examiner, all Level III jobs

Hours Class: 1 hour daily — Total: 15 hours

Description and Teaching Suggestions

This unit will develop skill in logical thinking as well as clear writing. Trainees should be acquainted with the function and use of reports in business and government, the various kinds of reports, and current trends in report writing. The introductory topics should be covered fairly quickly since most of the time should be spent in actual practice and report evaluation. The needs of the trainees also should be taken into account when determining the time allotment. Some typical reports should be obtained from business, and duplicated and distributed so that trainees may observe the ways in which writing style and format of reports differ from letters. Trainees should also note how reports differ from one another in writing style, organization, and presentation.

The unit on reports should follow a unit on correspondence, so that trainees may have adequate time for collecting materials and organizing them for written presentation. Evaluation of trainee achievement should be made by using submitted reports.

Standards of Achievement

Organize and prepare, in good form and acceptable style, simple business reports on a variety of subjects assigned.

Prerequisites for Study of Business Reports

Business Correspondence

Topic Outline

I. Function of Reports in Business and Government
II. Comparison of Letters and Reports
III. Comparison of Different Types of Reports

IV. Memorandum Reports for Internal Use
V. Practice Report Writing

TOPIC I. FUNCTION OF REPORTS IN BUSINESS AND GOVERNMENT

A. Basis for administrative decisions
B. Historical record
C. Requests for consideration or action

TOPIC II. COMPARISON OF LETTERS AND REPORTS

A. Writing style
B. Format

TOPIC III. COMPARSION OF DIFFERENT TYPES OF REPORTS

A. Narrative report
B. Statistical report
C. Investigative report
D. Progress information report
E. Report on reasons for delay in schedule
F. Financial report
G. Contemplated action report
H. Advisory reports

TOPIC IV. MEMORANDUM REPORTS FOR INTERNAL USE

A. Purpose
B. Addressee
C. Copyholders
D. File record
E. Regular or special

TOPIC V. PRACTICE REPORT WRITING

A. Methods of collecting data
   1. Primary sources
   2. Secondary sources
B. Evaluating and selecting data
C. Classifying and organizing information
D. Developing logical reasoning process
E. Drawing conclusions
F. Making recommendations
G. Presenting graphic material
H. Writing letter of transmittal

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D. See also Business Correspondence Unit.

BROMAGE, MARY C. *Writing for Business.* Ann Arbor, Mich: University of Michigan Press, 1965.

BROWN, L. *Communicating Facts and Ideas in Business.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

———. *Effective Business Report Writing, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

GRAVES, H. F. AND HOFFMAN, L. S. S. *Report Writing, 4th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

LAWRENCE, N. R. *Writing Communications in Business.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

SHURTER, R. L.; WILLIAMSON, J. P.; AND BROEHL, W. *Business Research and Report Writing for Business.* New York: McGraw-Hill, 1965.

SIGBAND, NORMAN B. *Effective Report Writing.* New York: Harper and Bros., 1960.

SKLARE, ARNOLD B. *Creative Report Writing.* New York: McGraw-Hill, 1964.

EFFECTIVE INTERNAL COMMUNICATIONS (EIC)

Basic Administrative Skill for: All Trainees EXCEPT Credit and Collection Manager, Escrow Officer, Interviewer and Claims Adjuster, Safe Deposits Manager, Title Clerk, File Service Worker

Hours Class: 2 hours daily

Total: 30 hours

Description and Teaching Suggestions

In this unit trainees will become familiar with communication philosophy and practices as applied to real business situations. Teachers should discuss the rationale of internal communications and the results anticipated from the use of various techniques; e.g., house organs, newspapers, newsletters, staff memoranda, and staff meetings.

Emphasis in this unit should be placed on writing interoffice memorandums. However, trainees should also be given practice in developing simple newsletters, house organs and newspapers, and in setting up and conducting informational staff meetings. A model company can be set up for these purposes and used for skill development activities. Feedback process should be presented and practiced for evaluating communications.

Standards of Achievement

1. Prepare a hypothetical employee magazine or newspaper.

2. Prepare other internal communications: e.g., memoranda to staff, newsletter.
3. Plan, conduct, and evaluate a staff meeting.

Prerequisites for Study of Effective Internal Communications

Completion of at least 12th grade English and trainee selection standards.

Topic Outline

I. Introduction
II. Principles
III. Methods
IV. Evaluation Techniques

TOPIC I. INTRODUCTION

A. Purposes of internal communications
B. Values and benefits
   1. Efficiency through understanding
   2. Better product or service
   3. Better competitive position
   4. Recognition of individual's role in organization

TOPIC II. PRINCIPLES

A. Transmission of organizational policies and objectives
B. Consideration of intended audience
C. Selection of content versus technique
D. Understanding—primary objective of communication
E. Provisions for evaluation of communication methods
F. Provisions for feedback

TOPIC III. METHODS

A. Employee magazines and newspapers
   1. Planning factors
      a. Purpose
      b. Content
      c. Editorship and staff
      d. Responsibility
      e. Printing
      f. Colors
      g. Pictures and copy
      h. Cost
      i. Publishing schedules and methods of distribution
      j. Measure of effectiveness
   2. Advantages and disadvantages for organization and individual
B. Newsletters and staff memorandums
   1. Planning factors
      a. Purpose
      b. Content
      c. Audience
      d. Organization of ideas
      e. Clarity of language
      f. Length
      g. Timing and method of distribution
   2. Advantages and disadvantages for organization and individual
C. Staff meetings
   1. Planning a meeting
      a. Purpose
      b. Topics
      c. Problems
      d. Rules
      e. Participants
      f. Scheduling
      g. Location and facilities—equipment, size, comfort, lighting, etc.
   2. Conducting a meeting
      a. Starting time
      b. Summarizing purpose
      c. Reviewing results of previous meeting (if any)
      d. Summarizing rules
      e. Introducing visitors or special participants
      f. Presenting background information
      g. Controlling discussion
      h. Eliciting participation
   3. Closing a meeting
      a. Summarizing discussion
      b. Thanking participants
      c. Announcing next meeting and topic and reviewing responsibility for action (if any)
   4. Postmeeting activities
      a. Evaluating meeting in terms of purpose
      b. Obtaining reports (as necessary)
      c. Talking with participants individually to get reaction

NOTE: The teacher should give opportunities to practice conducting 15-minute staff meetings to as many trainees as possible. After each meeting the class should hold a critique to evaluate the technique used.

D. Reading racks
   1. Purposes of providing materials
      a. Hygiene
      b. Safety
      c. Personal welfare
      d. Educational
      e. Other

2. Intended audience
3. Selection of material
4. Costs
5. Placement of racks
6. Maintenance of racks
7. Special requests
8. Availability of free materials

E. Bulletin boards
   1. Purpose
   2. Current information of interest to audience
   3. Costs of buying and maintaining bulletin boards
   4. Selection of material for bulletin boards
   5. Timetable for removal of each piece on bulletin board
   6. Writing of bulletins
      a. Clarity
      b. Conciseness
      c. Readability

F. Special letters to employees
   1. Mailing to home
   2. Involvement of other family members

NOTE: Trainees should be given practice in developing or choosing materials appropriate for the topics (A) through (F).

TOPIC IV. EVALUATION TECHNIQUES

A. Attitude surveys
B. Employee meetings
C. Policy audits
D. Review of grievances
E. Grapevine

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

AURNER, DR. ROBERT R. AND BURTNESS, DR. PAUL S. *Effective English for Business, 5th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, and Manual.

GUNNING, ROBERT. *The Technique of Clear Writing.* New York: McGraw-Hill, 1961.

HIMSTREET, WILLIAM C.; PORTER, LEONARD J.; AND MAXWELL, GERALD W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

HIMSTREET, WILLIAM C. AND WAYNE, M. BATY. *Business Communications.* Belmont, Calif.: Wadsworth Publishing Co., 1964.

HUFFMAN, HARRY AND LEAHY, SYRELL R. *New Developments in Business Communications, New Media in Teaching the Business Subjects, Yearbook of the National Business Education Association, vol. 3.* Washington: 1965.

JANIS, J. HAROLD. *Writing and Communication in Business.* New York: Macmillan, 1964.

MENNING, J. H. AND WILKINSON, C. W. *Communication Through Letters and Reports, 4th ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1967.

MURPHY, DENNIS. *Better Business Communication.* New York: McGraw-Hill, 1961.

PARKHURST, CHARLES CHANDLER. *Business Communication for Better Human Relations, 7th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

PHILLIPS, DAVID C. *Oral Communication in Business.* New York: McGraw-Hill, 1961.

PORTER, L. J. *Communication—The No. 1 Goal, Business Education in Action. Yearbook of the National Business Education Association, vol. 2.* Washington: 1964.

SHURTER, R. L. AND WILLIAMSON, J. P. *Written Communication in Business, 2nd ed.* New York: McGraw-Hill, 1964.

SIGBAND, NORMAN B. *Effective Report Writing.* New York: Harper and Bros., 1960.

STEWART, M. E.; HUTCHINSON, L. E.; LANHAM, F. W.; AND ZIMMER, K. *Business English and Communication.* New York: McGraw-Hill, 1964.

WILLIAMS, G. *Effective Business Communication.* New York: Ronald Press, 1966.

ZIMMER, KENNETH. *Business English and Communication.* New York, McGraw-Hill, 1964.

EFFECTIVE INTERPERSONAL RELATIONS (ER)

Functional Knowledge for: All Trainees

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 40 hours

Description and Teaching Suggestions

This unit is designed primarily for trainees who must influence or secure cooperation from other persons for successful task accomplishment, and will be advantageous to trainees preparing for supervisory positions or upgrading their supervisory skills. Coupled with the Principles of Effective Supervision unit, it will help to develop greater effectiveness in dealing with people in work and social situations. It should be given late in the trainee's program.

Because interpersonal relations are affected by a variety of factors, some attention should be given at the outset to a review of office and personal etiquette. This review can serve as a springboard for starting role plays centering on office behavior problems.

Each role play should be followed by an analysis by the group of the individual's performance in terms of his behavior and attitudes.

As the unit progresses, the teacher should couple exposition of needs, attitudes, motivations, values, judgments, expectations, defenses, and other influences acting on the individual that evoke the behaviors perceived by the group as effective or ineffective in interpersonal relations. Thus, trainees will be afforded opportunities to critique and be critiqued by the group, to understand the causes of and develop insight into their behavior, and to become aware of the behavior of others.

The skill of the teacher is paramount to the success of this unit. He should establish a permissive and nonthreatening group climate in which free communication and behavior can take place.

The overall aim is to establish greater personal effectiveness with others so as to develop better cooperative and superior-subordinate relationships in working situations.

Rating forms, role plays, incident method techniques, group discussion, tasks, and lecturettes by the teacher should be combined effectively. The topical outline need not be followed in sequence since it is extremely difficult to predict which process will require explanation at any instant. Sequencing must be flexible. Preferably, the teacher for this unit should have a good background in psychology and group dynamics; he should avoid psychotherapy levels of group technique. Major concern should be for the "what" of individual behavior.

Standards of Achievement

Achievement standards for this unit cannot be set, since the effectiveness of adjustment of personal behavior can best be judged on the job. "Before" and "after" evaluations for comparison purposes cannot be made in a meaningful way.

Prerequisites for Study of Effective Interpersonal Relations

Trainee selection standards.

Topic Outline

I. Etiquette and Behavior in the Office
II. Interpersonal Communication
III. Defense Mechanisms
IV. Group Dynamics
V. Roles and Interpersonal Relations
VI. Analysis of Behavior

TOPIC I. ETIQUETTE AND BEHAVIOR IN THE OFFICE

A. Formal organization of the office
B. Office as setting for formal and informal social relationships
C. Office etiquette and its importance as lubricant for starting interpersonal relations
D. Office behavior
    1. Prescribed and regulated
    2. Nonprescribed and free

NOTE: Practice role plays of typical office situations (incident process technique can be used in addition to written role plays) involving prescribed and non-prescribed behavior, with subsequent analysis and group critique of individual behavior. The balance of unit content can be related to subsequent role play sessions, with lecturettes by the teacher, to explain "why" things happen in interpersonal relations and group situations.

TOPIC II. INTERPERSONAL COMMUNICATION

A. Definition
B. Importance of face-to-face contacts
C. Listening techniques
    1. For content
        a. Manifest
        b. Latent
    2. For meaning
D. Factors in communication
    1. Factors common to both sender and receiver
        a. Attitudes and emotion
        b. Needs and wants
        c. Implied demands
        d. Responses in action
    2. Vocabulary choice-communication range
    3. Perceptions of "the other"
    4. Timing of communication
    5. Atmosphere development between persons
    6. Prior experiences involving persons in communication situation
        a. With each other
        b. Past experiences of each with others
    7. Prejudices, opinions, assumptions, and value judgments
    8. Objectivity and subjectivity
    9. Intelligence and other personal differences
    10. The Shannon-Weaver Analog
E. Blocking and unblocking in the communication process
F. Importance of communication in group relationships

NOTE: The teacher should use as much of the "here and now" process as possible. This can be done using the group discussions as sources of raw material for analysis of personal communication problems.

TOPIC III. DEFENSE MECHANISMS

A. Review of human needs
   1. Physical
   2. Psychosocial
B. Perception of threat
   1. Real threats blocking need satisfaction
   2. Perceived threats blocking need satisfaction
C. Reaction to threat
   1. Physical
   2. Emotional
D. Rationalization
E. Projection
F. Aggression
G. Displaced aggression
H. Other defense mechanisms
I. Usefulness of defense mechanisms to individual
J. Meaning of defensiveness in interpersonal relations
   1. Destructive influence
   2. Perceptions and evaluations made by other persons
   3. Blocking communication
K. Awareness and reduction of defensiveness through greater acceptance of others

TOPIC IV. GROUP DYNAMICS

A. Forces in groups
B. Involvement of individual in group situations
C. Group "syntality"
D. Influence of group on individual:
   1. Pressure to conform
   2. Acceptance and rejection
   3. Need satisfaction and goal attainment
E. Establishing group climate for effectiveness in goal attainment

TOPIC V. ROLES AND INTERPERSONAL RELATIONS

A. Superior-subordinate relationships
   1. Perception of superior by subordinate
   2. Perception of subordinate by superior
   3. Authority and power factors
   4. Leadership role of superior and its effect
      a. Autocratic
      b. Democratic
      c. Laissez-faire
   5. Dominance and dependence need factors at work in superior-subordinate relationships
   6. Orientation problem in superior-subordinate relationships
      a. Task orientation
      b. People orientation
   7. Evaluational problems
B. Peer relationships
   1. Perceptions by peers of each other
   2. Ambitions of peers and effect on cooperative relationships
   3. Establishing climate for effective cooperation
   4. Peer expectancies
C. Advisory relationships
   1. Line and staff members' relationships and perceptions by each
   2. Areas of working relationships
      a. Recommendations
      b. Suggestions
      c. Approvals and disapprovals
   3. Establishing climate of line and staff members for creating effective working relationships

TOPIC VI. ANALYSIS OF BEHAVIOR

A. Self-evaluation
B. Group evaluations of individuals in class
C. Feedback of evaluations
D. Correction of self-perception
E. Opportunity for adjustment of behavior by individual

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BASS, B. M. *Leadership, Psychology, and Organizational Behavior.* New York: Harper and Row, 1959.

BERELSON, B. AND STEINER, G. A. *Human Behavior: An Inventory of Scientific Findings.* New York: Harcourt, Brace, and World, 1964.

CHRUDEN, HERBERT J. AND SHERMAN, ARTHUR W. JR. *Readings in Personnel Management.* Cincinnati: South-Western, 1961.

DUDYCHA, GEORGE J. *Applied Psychology.* New York: Ronald Press, 1963.

HECKMAN, I. L. AND HUNERYAGER, S. G. *Human Relations in Management.* Cincinnati: South-Western, 1960.

LAIRD, D. AND LAIRD, E. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961.

MACGIBBON, ELIZABETH G. *Fitting Yourself for Business, 4th ed.* New York: McGraw-Hill, 1961.

MAIER, N. R. F.; SALEM, A. R.; AND MAIER, A. A. *Supervisory and Executive Development: A Manual for Role Playing.* New York: John Wiley and Sons, 1957.

MENNINGER, WILLIAM C. AND LEVINSON, HARRY. *Human Understanding in Industry.* Chicago: Science Research Associates, 1956.

MORGAN, CLIFFORD T. *Introduction to Psychology, 2nd ed.* New York: McGraw-Hill, 1961.

NEWTON, R. AND GREEN, J. H. *How To Improve Your Personality, 3rd ed.* New York: McGraw-Hill, 1961.

PARKHURST, CHARLES G. *Business Communication for Better Human Relations, 7th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

PIGORS, PAUL AND PIGORS, FAITH. *The Incident Process: Case Studies in Management Development, Series F.* Washington: Bureau of National Affairs, 1955.

RUSSON, ALLIEN R. *Business Behavior, 3rd ed.* Cincinnati: South-Western, 1964.

SFERRA, ADAM; WRIGHT, MARY E.; AND RICE, LOUIS A. *Personality and Human Relations, 2nd ed.* New York: McGraw-Hill, 1961.

SHERIF, MUZAFER. *Intergroup Relations and Leadership.* New York: John Wiley and Sons, 1962.

EMPLOYEE APPRAISAL AND COUNSELING (EAC)

Functional Knowledge for: Bank Cashier, Chief Clerk, Credit and Collection Manager, Credit Union Supervisor, Insurance Office Manager, Office Manager, Process-Description Writer, Safe Deposits Manager, Procurement Services Supervisor, Branch Manager, General Foreman, Property-Disposal Officer, Operations Officer, and all Level III jobs EXCEPT Direct-Mail Specialist

Hours Class: 2 hours daily Total: 60 hours

Description and Teaching Suggestions

An employee normally expects to be told how well he is doing at his present job, how he can do it better, whether he may be able to advance, and how he may prepare himself for advancement within the organization. While such appraisal and counseling are the direct responsibility of the employee's immediate supervisor, they are also matters of concern to many other people in an organization whose work revolves about the development of the work force. These people are usually in the position to recommend policies and procedures for employee appraisal and counseling.

This course unit has been designed primarily for trainees who are preparing to upgrade their skills in supervisory and administrative positions. It can also be useful, however, as a supplement to the Performance Standards and Principles of Effective Supervision units.

The introductory portion of this unit explores the need for employee appraisal as seen from several position perspectives. The unit proceeds with an examination of the underlying concepts of employee appraisals, types and systems for appraising employees, and the "how to" of appraising. It finally focuses on appraisal and counseling interviews as a means for helping the employee develop self-improvement goals and plans.

Throughout the unit, the teacher should stress the nature and ethics of appraisal and counseling interviews and the preservation of privileged information.

The available time should be apportioned between discussions, lectures, and laboratory sessions, with the greatest emphasis being given to the laboratory sessions—the learning by doing phase. In group discussions of appraisal and counseling problems, maximum trainee participation should be encouraged; in laboratory sessions, role playing, followed by group critiques, should be used. It is suggested that the teacher prepare cases and roles well in advance and give periodic quizzes to uncover areas for review.

Standards of Achievement

1. Demonstrate knowledge of advantages and disadvantages of several types of appraisal methods.
2. Write several sample appraisal reports, including information developed in counseling interviews regarding an employee's current performance and potential for other jobs.
3. Develop simple plans for employee development or training based on the results of several appraisal reports.
4. Write up a simple case study as a result of a counseling interview.
5. Demonstrate ability to explain orally the complete details of one type of appraisal system, including its potential effects on certain personnel in an organization.

Prerequisites for Study of Employee Appraisal and Counseling

At least 2 years of postsecondary training or equivalent. The Performance Standards and Principles of Effective Supervision units are suggested as concurrent studies.

Topic Outline

I. Employee Appraisal
II. Basic Concepts of Employee Appraisal
III. Benefits of Employee Appraisal to Superior and Subordinate
IV. Appraisal Systems

V. How To Appraise
VI. The Appraisal Interview
VII. Employee Counseling
VIII. Tools and Techniques of Counseling
IX. Pitfalls in Counseling

TOPIC I. EMPLOYEE APPRAISAL

A. Reasons for using
   1. Evaluating employee's present performance
   2. Evaluating employee's potential
   3. Meeting organizational objectives and standards
   4. Developing manpower
   5. Improving quality of managerial judgment
   6. Rating for merit increases
   7. Helping with selection criteria
B. Users and uses of appraisals
   1. Manager—development of subordinate employees
   2. Personnel officer
      a. Promotions, discharges, transfers
      b. Checks on probationary employees
      c. Disciplinary problems
   3. Training officer—preparation of appropriate training and development programs
   4. Counselor—assistance with personnel problems
   5. Organization and manpower planning officer —assistance in development of organizational and manpower schedules
   6. Wage and salary administrator—merit increase system
   7. Employment manager—criteria for selection of new employees

TOPIC II. BASIC CONCEPTS OF EMPLOYEE APPRAISAL

A. Basic principles of employee appraisal
   1. Comparing employee's performance with established goals and standards
   2. Comparing employee's qualifications—education, experience, personal characteristics
      a. Current jobs
      b. Potential jobs
   3. Determining areas of weakness which require strengthening to meet requirements
      a. Present job
      b. Potential job
B. Differences between employee appraisal and merit rating
C. Developing performance standards and goals
   1. Quantitative standards
   2. Qualitative standards
D. Frequency of appraisals
E. Qualifying and training raters
F. Appraisals and salary
G. Field review of appraisal system

TOPIC III. BENEFITS OF EMPLOYEE APPRAISAL TO SUPERIOR AND SUBORDINATE

A. To the appraiser (superior)
   1. Sharpens control over own activities
   2. Clarifies responsibility for results
   3. Repositions perspective in evaluating subordinates
   4. Forms objective basis for discussing salary and promotion
   5. Aids effective recruitment
   6. Invites self-growth of superior as well as subordinate
   7. Demonstrates managerial abilities and skills rather than technical competencies
B. To the appraised employee (subordinate)
   1. Lets him know how he is doing
   2. May suggest specific development plans
   3. Provides incentive for individual effort
   4. Relates to job satisfaction

TOPIC IV. APPRAISAL SYSTEMS

A. Types of appraisals
   1. Individual (by supervisor—vertical rating)
   2. Group (by several supervisors acting in concert)
   3. Multiple (by several supervisors acting independently)
   4. Appraisal by subordinates
   5. Horizontal rating
   6. Self-rating
B. Rating scales
   1. By rating of qualities (traits) of individual
      a. Appropriateness of qualities to work assignments
      b. Sharp definability of qualities
      c. Mutual independence of qualities
      d. Obvious measures—punctuality, quality of output, quantity of output
   2. By type of rating scale
      a. Ranking
      b. Numerical
      c. Graphic
      d. Graded
      e. Weighted
      f. Linear

g. Check list
h. Forced choice
i. Combination of scales
j. Anecdotal support of rating
k. Critical incident support of rating

NOTE: Discuss advantages and disadvantages of each item in (A) and (B).

C. Criteria for selection of rating scale and appraisal system
   1. Reliability
   2. Validity
   3. Avoidance of halo effect
   4. Avoidance of central tendency—leniency factor
   5. Adherence to application of like standards for all
   6. Effects of systematic and total errors on ratings
D. Formal versus informal systems
E. Quality of rater judgment and rater training
F. Acceptance by employees
G. Maintaining confidential information
H. Coordination of appraisal procedures with:
   1. Merit increase procedures
   2. Personnel department procedures
   3. Organization planning procedures
I. Inception and implementation of appraisal system
   1. Notification and explanation to employee
   2. Training of raters
   3. Responsibility for implementation and control
J. Audits of appraisal system
   1. Internal responsibility
   2. Reappraisal by consultants
   3. Reappraisal by industrial psychologists

TOPIC V. HOW TO APPRAISE

A. Use of position descriptions
B. Identification of contribution of position to organizational goals
   1. Major goals
   2. Departmental or divisional goals
C. Use of performance standards
D. Identification of appropriate attributes to be rated
E. Selection of rating methods and forms
   1. Reliability
   2. Validity of criteria
F. Pitfalls in rating
   1. Halo effect
   2. Central or leniency tendency
   3. Quantification of opinions or impressions
G. Daily records of employee performance
   1. Critical incident methods
   2. Completeness of observations
   3. Consideration of factors involved in recording performance
      a. Behavior attributable to organization policies and procedures
      b. Behavior attributable to managerial climate and personality of rater
      c. Behavior attributable to lack of information or training
      d. Influence of labor organization
      e. Observable production results
H. Records of results of tasks or responsibilities handled by other than direct production subordinates
   1. Accountability factors
      a. Key results desired—objectives
      b. Measures of performance standards
      c. Job targets or personal objectives
   2. Appraising managerial skills
      a. Technical knowledge and experience
      b. Long-range planning ability
         (1) Planning requirements of the job
         (2) Appraisal of planning ability
      c. Ability to make decisions
      d. Ability to plan and organize current operations
      e. Ability to coordinate and direct
         (1) Skill in communication
         (2) Direct supervisory effectiveness
         (3) Effect on group relationships
      f. Ability to delegate and assign
      g. Willingness to checkup and followup
I. Appraising personal traits and behavior characteristics pertinent to job performance
   1. Intelligence
   2. Analytical ability
   3. Judgment
   4. Initiative and resourcefulness
   5. Dependability
   6. Decisiveness
   7. Adaptability and flexibility
   8. Emotional stability
   9. Leadership
   10. Health and stamina versus job requirements
   11. Attitudes, motivation, and understanding
      a. Principles and philosophy of management
      b. Quality of personal motivation
J. Overall picture or report of raters (to be prepared by each trainee)
   1. Conciseness

2. Clarity
3. Accuracy

NOTE: The teacher should have prepared case studies, group tasks, role plays, and rating forms well in advance for use by the trainees to help develop skills in appraising. This topic should largely be presented by using laboratory experiences of the trainees in personal involvement situations. Each trainee should have opportunities to rate several other trainees who have participated in situations with him. The information and reports prepared by the trainees should be kept for use in the appraisal and counseling interview portions of the program.

TOPIC VI. THE APPRAISAL INTERVIEW

A. Objectives
B. Attitude of the appraiser
C. Ground rules
   1. Time
   2. Setting
   3. Confidence—minimized tensions
   4. Interchange of ideas
   5. Review of all factors, standards, and goals
   6. Setting of goals for immediate and intermediate future
   7. Arrangement for "play back" of agreements
D. Preparation for counseling interviews
   1. Information about agreements reached for improvement
   2. Scheduling of interviews
   3. Availability of counselor for unforeseen problems

TOPIC VII. EMPLOYEE COUNSELING

A. Philosophy and ethics of counseling
   1. Self-education and self-direction of employee
   2. Understanding relations of self and environment
B. Counseling approaches
   1. Nondirective
   2. Directive

TOPIC VIII. TOOLS AND TECHNIQUES OF COUNSELING

A. Observation of counselee
   1. Stresses and tensions
   2. Environmental factors—ability to cope with factors
   3. Counselee's attitude toward assistance
B. Case study
   1. The autobiography
      a. Controlled
      b. Uncontrolled
   2. Diagnosis
   3. Prognosis and prediction—use of tests
   4. Followup
C. Interview practice
   1. Purposes of the interview (relate to appraisal interview)
      a. Establishment of rapport
      b. Collection of information
      c. Allowing counselee to think aloud
      d. Conveying information to counselee
   2. Releasing expression
D. Achievement of insight
   1. Increase in self-understanding
   2. Recognition and acceptance of self
E. Use of consultants or specialists in the counseling field

TOPIC IX. PITFALLS IN COUNSELING

A. Fallacy of generalization
   1. Individual differences
   2. Environmental and situational influences
B. Fallacy of labels, scales, or keys
C. Fallacy of implicity
D. Fallacy of belief
E. Failure to consider prior psychological test results for individual

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BENNETT, MARGARET E. *Guidance and Counseling in Groups, 2nd ed.* New York: McGraw-Hill, 1963.

BLOCKER, DONALD H. *Developmental Counseling.* New York: Ronald Press, 1966.

COSTELLO, TIMOTHY AND ZALKIND, SHELDON S. *Psychology in Administration.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

DUNNETTE, MARVIN D. AND KIRCHNER, WAYNE K. *Psychology Applied to Industry.* New York: Appleton-Century-Crofts, 1965.

GILMER, B. VON HALLER. *Industrial Psychology.* New York: McGraw-Hill, 1961.

HEPNER, HARRY H. *Psychology Applied to Life and Work, 4th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

KELL, BILL L. AND MUELLER, WILLIAM J. *Impact and Change: A Study of Counseling Relationships.* New York: Appleton-Century-Crofts, 1966.

LOPEZ, FELIX. *Personnel Interviewing.* New York: McGraw-Hill, 1966.

MAIER, NORMAN R. F. *The Appraisal Interview.* New York: John Wiley and Sons, 1958.

PIGORS, PAUL; MYERS, CHARLES A.; AND MALM, F. T. *Management of Human Resources.* New York: McGraw-Hill, 1964.

ROWLAND, VIRGIL K. *Managerial Performance Standards.* New York: American Management Association, 1960.

SCHEIN, EDGAR H. *Organizational Psychology*. Englewood Cliffs, N.J.: Prentice-Hall, 1963.
SMITH, HENRY CLAY. *Psychology of Industrial Behavior, 2nd ed.* New York: McGraw-Hill, 1961.
———. *Sensitivity to People*. New York: McGraw-Hill, 1966.
TIFFIN, JOSEPH AND MCCORMICK, E. J. *Industrial Psychology, 5th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.
TYLER, LEONA E. *Tests and Measurements*, Englewood Cliffs, N.J.: Prentice-Hall, 1963.
VROOM, VICTOR H. *Work and Motivation*. New York: John Wiley and Sons, 1964.
WARTERS, JANE. *Techniques of Counseling, 2nd ed.* New York: McGraw-Hill, 1964.
WEITZ, HENRY. *Behavior Change Through Guidance*. New York: John Wiley and Sons, 1964.

FUNDAMENTALS OF INTERVIEWING (FI)

Basic Skill for: All Trainees Except Bank Cashier, Escrow Officer, Junior Executive, Safe Deposits Manager, Title Clerk, Trainee Manager, Property-Disposal Officer, Trust Officer, Industrial Organization Manager, Treasurer

Hours Class: 1 hour daily; Laboratory: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to develop the trainee's ability to interview people, and to obtain and verify information. It will also give trainees practice in special purpose interviews such as those for charge accounts, credit, employment, or surveys.

After a brief introduction to basic techniques, trainees should be given intensive role playing assignments in various types of interviews. (Interviews by experienced interviewers, either in person or on tape, should be used as models.) Each trainee should conduct several practice interviews of different types, e.g., for loans, employment, surveys, etc.

To assure that role playing in the laboratory sessions is as realistic as possible, trainees should prepare carefully for each interview and be guided in their respective roles. The roles prepared by the teacher should be so assigned that all trainees have several assignments as both interviewer and interviewee.

In advance of the laboratory session, trainees playing the roles of interviewees should be given application forms and resumes of the fictitious persons whom they are to portray. For example, a man who will play the role of an applicant for an automobile loan would study the applicant's income, work history, some factors in his personal background, and the price and type of car being considered.

Trainees who will act as interviewers will receive credit criteria to qualify applicants for an auto loan. The interviewers, however, should not be told anything about the applicant before the interview in order to make the laboratory interviews similar to those that actually occur at a bank or other lending institution.

Similar role playing sessions should be conducted for telephone reference and credit checks. In these sessions, trainees should have opportunities to play various roles; e.g., credit clerk, personal reference, business reference, etc.

Each interviewer should be rated on an interviewer rating form. A critique should be conducted by the teacher and class after each interview. Taping the interview and playing it back during the critique will be very helpful, particularly to the participants, who will then hear exactly how they sounded. As trainees gain experience, their increased proficiency will be reflected by improved ratings.

Standards of Achievement

1. Conduct credit or other interviews satisfactorily as judged by teacher.
2. Demonstrate proficiency in interviewing as judged on interviewer rating forms and by teacher.
3. Exhibit satisfactory knowledge of and skill in conducting a survey interview; in discussing arrangements for a large group tour with group spokesman.

Prerequisites for Study of Fundamentals of Interviewing

Trainee should have completed the Effective Interpersonal Relations unit or be taking it concurrently.

Topic Outline

I. Interviews
II. Conducting Interviews
III. Evaluating Results of Interviews
IV. Problems in Interviewing
V. Checking References
VI. Methods of Obtaining Information from References
VII. Using Outside Investigators

TOPIC I. INTERVIEWS

A. Purpose
   1. Obtaining information
   2. Evaluating background
   3. Evaluating character and personality of interviewee
   4. Providing information
   5. Maintaining good public or employee relations
B. Completing applications or forms
   1. Assisting interviewee
      a. To clarify information needed
      b. To fill in form correctly
   2. Checking for completeness
   3. Preparing questions from information furnished
      a. Identifying factors needing elaboration
      b. Identifying factors that will bring out more information
      c. Identifying factors that are not clear
   4. Critical areas to watch
      a. Work experience
         (1) Amount of time
         (2) Types
         (3) Financial level of compensation
      b. Present financial ability
      c. Prior credit repayment references

TOPIC II. CONDUCTING INTERVIEWS

A. Starting the interview and establishing rapport
   1. Putting applicant at ease
   2. Asking first questions
      a. Picking noncontroversial matter from application
      b. Getting applicant to start talking
B. Guiding the body of the interview
   1. Asking specific questions
   2. Letting applicant talk
C. Closing the interview
   1. Telling interviewee when he can expect decision or information
      a. Answering applicant if interviewer can do so
      b. Rejecting applicants diplomatically
   2. Keeping good image of company
   3. Timing the interview
D. Remembering key points
   1. Taking notes during interview
      a. Inhibiting applicant's conversation
      b. Helping to remember facts
   2. Writing notes after interview

TOPIC III. EVALUATING RESULTS OF INTERVIEWS

A. What was learned about applicant
B. What was not learned about applicant
C. Dangers in evaluating
   1. Biases of interviewer
      a. For or against certain ethnic, racial, etc., groups
      b. Personal characteristics of interviewer
      c. Halo effect—good traits blinding perception of faults
      d. Overcoming personal biases and halo effect
         (1) Recognizing them
         (2) Compensating for them

TOPIC IV. PROBLEMS IN INTERVIEWING

A. "Don'ts" in questioning applicants
   1. Avoid asking "yes or no" questions unless specifically needed for verification of completeness of application
   2. Don't put words in applicant's mouth
   3. Don't jump at conclusions
   4. Don't settle for any answer—come back to main point desired by way of supplementary questions
B. Controlling the interview
   1. Helping shy applicants
      a. Asking open-end questions
      b. Using nondirective techniques
   2. Controlling the too-talkative
      a. Asking key questions
      b. Breaking in and bring back to main subject
      c. Watching for digressions
C. Common weaknesses of interviewers
   1. Talking too much
   2. Guiding applicant too much
   3. Dominating interview
   4. Talking down to applicant
   5. Failing to listen
      a. Importance of listening
      b. Problems in listening
      c. Learning how to listen
      d. Developing good listening habits

TOPIC V. CHECKING REFERENCES

A. Purposes
   1. Verifying information obtained from application and interview
   2. Obtaining evaluation by people who know interviewee's work history

3. Obtaining information not disclosed on application or during interview

B. References supplied by applicant
   1. Letters
      a. Not always honest
      b. Often vague
      c. May not give specific information sought
   2. Personal references
   3. Previous employers—best source

C. Information to be requested from references
   1. Work record and salaries
   2. Dependability

D. Factors to consider in evaluating replies
   1. Replies are not often complete
   2. Fear by replier of writing derogatory matter (libel suit possibility)
   3. Vagueness
      a. To cover negative factors
      b. Due to inability or inattention of respondent
   4. Information is often taken from records which may not tell complete story

TOPIC VI. METHODS OF OBTAINING INFORMATION FROM REFERENCES

A. By letter
   1. Form requests
   2. Check lists
   3. Individual letters

B. By telephone
   1. Reasons for effectiveness
      a. Direct contacting possibility
      b. Offering opportunity for asking specific questions
      c. Following up answers
      d. Picking up doubts and omissions from voice
   2. Preparing questions and check list before calling

NOTE: Have students design such a list.

   3. Speaking to reference
      a. Establishing rapport
      b. Being businesslike
      c. Letting reference talk freely
      d. Not putting words in respondent's mouth
      e. Finding strengths and weaknesses

C. By personal visit
   1. Arranging meeting with reference
   2. Using same principles as in telephone checks
   3. Visiting personally—more effective and elicits more information

TOPIC VII. USING OUTSIDE INVESTIGATORS

A. Getting much more personal information
   1. In applicant's neighborhood
   2. From police records

B. Obtaining information on currently employed people

C. Selecting investigating agencies—credit, personal

D. Limitations on outside investigating
   1. May not obtain best available information
   2. Expensive

Texts and Other Teaching Materials

No single text is available that covers all course unit topics. However, appropriate chapters may be selected from the following suggested texts and materials (or equivalent commercially available material) for use in this unit. Additional materials are listed in appendix D.

ASPLEY, JOHN C. *Employee Relations Handbook*. Chicago: Dartnell, 1955.

BALINSKY, BENJAMIN AND BURGER, RUTH. *The Executive Interview*. New York: Harper and Bros., 1959.

BECHMAN, THEODORE. *Credits and Collections, 7th ed.* New York: McGraw-Hill, 1962.

BLYTH, J. *How To Conduct a Selection Interview*. New York: Argyle Publishing, 1965.

BOYNTON, PAUL. *Selecting the New Employee*. New York: Harper and Bros., 1959.

BURTT, HAROLD. *Principles of Employment Psychology*. New York: Harper and Bros., 1959.

CHAPIN, ALBERT F. AND HASSETT, GEORGE E. *Credit and Collection Principles and Practice, 7th ed.* New York: McGraw-Hill, 1960.

CORSINI, R. J.; SHAW, M. E.; AND BLAKE, R. R. *Roleplaying in Business and Industry*. New York: The Free Press of Glencoe, 1961 (for teacher).

FEAR, RICHARD A. *The Evaluation Interview*. New York: McGraw-Hill, 1958.

JUCIUS, MICHAEL J. *Personnel Management, 6th ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1967.

KAHN, R. AND CANNELL, C. *The Dynamics of Interviewing: Theory, Techniques, and Cases*. New York: John Wiley and Sons, 1957.

LOPEZ, FELIX. *Personnel Interviewing*. New York: McGraw-Hill, 1965.

MALONEY, P. W. *The Exit Interview*. New York: American Management Association, 1963.

MALONEY, P. W. AND THOMAS, D. *Interviewing the Potential Employee*. New York: American Management Association, 1961.

MANDELL, MILTON. *The Employment Interview*. New York: American Management Association, 1961.

———. *The Selection Process: Choosing the Right Man for the Job*. New York: American Management Association, 1964.

INDEXING AND FILING PRACTICES (IFP)

Functional Knowledge for: Interviewer and Claims Adjuster, File Service Worker, Vocational Disability Examiner

Hours Class: 1 hour daily, Laboratory: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

This unit will assist trainees to understand business filing requirements and to develop skills in filing and indexing. The unit should provide the trainee with the sense of system and order necessary to maintain necessary records. Emphasis is placed on the rules and practices of alphabetic filing. Geographic and numeric systems also should be discussed and practiced. Identification, storage, and retrieval methods should be the heart of the training, and practice in retrieving filed information should also be given. The laboratory time should be used exclusively for practice, and the laboratory should have book files, rotary files, drawer files, open-shelf files, and vertical files. Every subtopic presented in class should be followed by practice in the laboratory sessions. After participating in drills using single filing rules, trainees should practice filing procedures requiring a whole range of rules. Power files and other special equipment files, such as microfilm and readers, should be discussed. The filing of computer tapes and punched cards may be mentioned but should not be discussed in detail since this type of filing is usually handled by special workers.

Teachers should obtain sufficient quantities of various types of letters, memos, orders, invoices, schedules, filled-in index cards, and similar documents for trainee exercise in sorting and filing. Visits to local offices by the trainees to observe filing system are suggested to highlight the importance of adequate and proper filing practices. Written tests should be given to evaluate basic knowledge. Achievement tests of skills meeting the Standards of Achievement for the unit should be given considerable weight.

Standards of Achievement

1. File accurately 50 to 80 3 x 5-inch cards in 20 minutes.
2. File accurately 60 to 90 pieces of correspondence in 20 minutes.
3. Index a variety of documents having names, geographical locations, or numbers.
4. Demonstrate understanding of purposes and use of files.
5. Set up a simple followup file system.

Prerequisites for Study of Indexing and Filing Practices

Trainee selection standards.

Topic Outline

I. Why a Business Maintains Files
II. Nature of Business Records
III. Basic Rules for Alphabetic Indexing and Filing
IV. Basic Rules for Numeric Filing
V. Filing Material
VI. Special Files
VII. Filing Equipment
VIII. Information Retrieval
IX. Retention and Purging of Files

TOPIC I. WHY A BUSINESS MAINTAINS FILES

A. Need for efficient storing of repetitively used records
B. Need to retrieve information

TOPIC II. NATURE OF BUSINESS RECORDS

A. Correspondence files
   1. Variations in systems
   2. Variations in types of equipment
B. Examples of files
   1. Traffic department
   2. Raw materials inventory maintenance
   3. Financial department
   4. Miscellaneous files

TOPIC III. BASIC RULES FOR ALPHABETIC INDEXING AND FILING

A. Terms used in indexing and filing
B. Rules for indexing and filing
   1. Individual names
   2. Variations in names and applicable rules
   3. Company names
   4. Variations in company names and applicable rules
   5. Special consideration—deviations from basic rules
   6. Geographic location filing
   7. Subject files
   8. Cross-referencing
C. Practice exercises and drills of all topics in B

TOPIC IV. BASIC RULES FOR NUMERIC FILING

A. Use of numeric files
B. Cross reference to alphabetic order
C. Chronological files (include followup files)

TOPIC V. FILING MATERIAL

A. Factors to consider in the choice of a filing system
B. Procedures for maintaining a correspondence file
   1. Nature of file folders
   2. Placement of material in the folder
   3. Designation of active versus inactive material
C. Handling of correspondence
   1. Notations for signaling materials ready for filing
   2. Procedure for preparing materials for filing
      a. Inspecting
      b. Indexing
      c. Coding
      d. Sorting
      e. Labeling or marking folder
      f. Inserting
D. Practice filing projects using operations in B

TOPIC VI. SPECIAL FILES

A. Central files (where volume is large)
   1. Filing material
   2. Charging out-of-file materials
B. Microfilms
C. Computer tape files
D. Punched card

NOTE: The teacher should give only light coverage to subtopics B, C, and D.

TOPIC VII. FILING EQUIPMENT

A. Cabinets (drawer-type)
B. Open shelf
C. Desk
D. Card files
E. Rotary
F. Visible
G. Vertical
H. Power

TOPIC VIII. INFORMATION RETRIEVAL

A. Identifying nature of information or document to be retrieved
B. Knowing company filing system
C. Computer or microfilm use

NOTE: The teacher should limit coverage of subtopic C to a brief description of the general use of computer and microfilm in information retrieval.

TOPIC IX. RETENTION AND PURGING OF FILES

A. Permanent record identification
B. Length of retention for certain records
C. Identification of active and inactive records
D. Purging files according to company policy
E. Transfer and storage of file information

NOTE: A filing system, such as the Varidex System (Remington Rand), Super-Ideal (Shaw-Walker), The Smead System, or others, should be shown and explained, if available.

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ARCHER, FRED C.; BRECKER, RAYMOND F.; FRAKES, JOHN C.; STEWART, JEFFREY. *General Office Practices, 3rd. ed.* New York: McGraw-Hill, 1968.

BASSETT, ERNEST D. AND OTHERS. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1963. Practice Set and Manual.

FAHRNER, WILLIAM F. AND GIBBS, WILLIAM F. *Basic Rules of Alphabetic Filing, Programmed Instruction.* Cincinnati: South-Western, 1965. Manual.

GRIFFIN, MARY C. *Records Management.* Boston: Allyn and Bacon, 1964.

GUTHRIE, MEARL R. *Alphabetic Indexing, 3rd ed.* Cincinnati: South-Western, 1964. Manual.

KAHN, GILBERT AND OTHERS. *Progressive Filing, 7th ed.* New York: McGraw-Hill, 1961.

———. *Gregg Quick Filing Practice.* New York: McGraw-Hill, 1965.

———. *Progressive Filing and Records Management, College Series.* New York: McGraw-Hill, 1962.

KISH, JOSEPH L. AND MORIS J. *Paperwork Management in Transition.* New York: American Management Association, 1964. Teacher's Reference.

PLACE, IRENE AND POPHAM, ESTELLE. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

SELDEN, WILLIAM H. AND OTHERS. *Filing and Finding.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

WEEKS, BERTHA M. *Filing and Records Management, 3rd ed. rev.* New York: Ronald Press, 1964.

Practice Sets

BASSETT, E. D. AND AGNEW, P. L. *Filing Practice Set.* Cincinnati: South-Western, 1963.

Filing Practice Set. Baltimore: The H. M. Rowe Co.

Indexing and Filing Workbook. Baltimore: The H. M. Rowe Co.

Job Sheets and Tests for Filing and Finding. Englewood Cliffs, N.J.: Prentice-Hall.

KAHN, G.; YERIAN, T.; AND STEWART, J. *Practice Materials for Progressive Filing, 7th ed.* New York: McGraw-Hill, 1961.

Principles of Indexing and Filing, 4th ed. Baltimore: The H. M. Rowe Co.

INTRODUCTION TO BUSINESS DATA PROCESSING (BDP)

Environmental Knowledge for: Chief Clerk, Clerical Technician, Credit and Collection Manager, File Service Worker, Office Manager, Purchase-Price Analyst, Procurement Services Supervisor, Budget Officer, Treasurer, Financial Institution Manager, Industrial Organization Manager

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

Much of today's business activities center around automated data processing and associated equipment. This unit is designed to help the trainee understand the office environment in which automated data equipment is used to expose him to the associated terminology, processes, and effects. Primarily, the unit presents an overview of data processing, possible applications, preparation of input, and automated equipment and processes. It is suggested that teachers provide for a trainee tour of an automated data processing office. Objective tests of knowledge acquired in business data processing fundamentals are suggested for evaluating trainees.

Standards of Achievement

Know fundamentals of data processing as evidenced on objective tests of factual material presented.

Prerequisites for Study of Introduction to Business Data Processing

Trainee selection standards.

Topic Outline

I. Importance and Uses of Data
II. Evolution and Growth of Data Processing Systems
III. Applications of Data Processing
IV. Basic Data Processing Cycle
V. Input-Output Data Representation
VI. Introduction to Systems and Equipment
VII. Peripheral Business Data Processing Occupations

TOPIC I. IMPORTANCE AND USES OF DATA

A. History of record keeping
B. Sources and types of data
C. Needs for data
D. Decisions based on data
E. Growing complexity of data

TOPIC II. EVOLUTION AND GROWTH OF DATA PROCESSING SYSTEMS

A. Definition of terms: data, data processing, technology, automation, etc.
B. Evolution of data processing systems
   1. Early one-man businesses (simple bookkeeping)
   2. Expansion of business and increasing need for data
   3. Early mechanization of the recordkeeping process
   4. Development of office machines
   5. Development of punched card systems
   6. Integrated data processing
   7. Electronic data processing systems
   8. Future of data processing
C. Data processing in the business organization
D. Filing techniques review
   1. Alphabetic files
   2. Numeric files
   3. Subject files
   4. Other types of files—chronological, geographical, etc.

TOPIC III. APPLICATIONS OF DATA PROCESSING

A. Engineering
B. Science
C. Statistics
D. Military
E. Financial and banking
F. Business and industry
   1. Accounting
   2. Payroll
   3. Reports
   4. Inventory and material control
   5. Production scheduling
   6. Labor distribution
   7. Sales analysis
   8. Market forecasting
   9. Management forecasting

TOPIC IV. BASIC DATA PROCESSING CYCLE

A. Collection of data (original documents, checks, time cards, etc.)
B. Input preparation and entry (preparing ledger pages, punching cards, etc.)
C. Processing
   1. Classifying (by location, production lot, etc.)
   2. Sorting (by code, account number, etc.)

3. Calculating (total volume, averages, deductions, etc.)
4. Summarizing (new or reconstructed data)

D. Storage (machine memory, library, paper files)
E. Output (punched cards, magnetic tape, document, statement)

TOPIC V. INPUT-OUTPUT DATA REPRESENTATION

A. Recording media
1. Punched card
2. Punched paper tape
3. Magnetic tape
4. Magnetic ink characters
5. Printed form
6. Cathode-ray tube
7. Other media

B. Coding systems (man-machine communication)

TOPIC VI. INTRODUCTION TO SYSTEMS AND EQUIPMENT

A. Manual systems
B. Machines
1. Typewriters
2. Reproducing machines
3. Calculators
4. Accounting machines
5. Key sorts

C. Electro-mechanical machines (functions and types)
1. Key-punches
2. Verifiers
3. Reproducers
4. Collators
5. Sorters
6. Interpreters
7. Calculators
8. Tabulators
9. Media converters (tape to card, card to tape)

D. Electronic computers

TOPIC VII. PERIPHERAL BUSINESS DATA PROCESSING OCCUPATIONS

A. Job functions and associated equipment
1. Tape librarian
2. Coding clerk
3. Key-punch operator
4. Tabulating machine operator
5. Console operator
6. Clerical supervisor
7. Machine records unit supervisor
8. Statistical clerk
9. Possible future occupation—peripheral equipment operator

B. Importance of peripheral business data-processing occupations

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ARCHER, FRED D.; BRECKER, RAYMOND F.; FRAKES, JOHN C.; AND STEWART, JEFFREY. *General Office Practice, 3rd ed.* New York: McGraw-Hill, 1968. (Chapter 7).

AWAD, ELIAS M. *Business Data Processing.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

AWAD, E. M. AND DATA PROCESSING MANAGEMENT ASSOCIATION. *Automatic Data Processing: Principles and Procedures.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

BASSETT, ERNEST D.; AGNEW, PETER L.; AND GOODMAN, DAVID G. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1964. Filing Office Practice Set, Final Examination, Placement Tests, and Manual.

CHAPIN, NED. *Introduction to Automatic Computers.* Princeton, N.J.: D. Van Nostrand Co., 1964.

DESMONDE, W. H. *Computers and Their Uses.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

FREEMAN, M. HERBERT; HANNA, J. MARSHALL; AND KAHN, GILBERT. *Gregg Bookkeeping and Accounting, 3rd ed.* New York: McGraw-Hill, 1963. (Contains special section on business data processing.)

GRIFFITH, MARY CLAIRE. *Records Management.* Boston: Allyn and Bacon, 1964.

HEIN, LEONARD W. *An Introduction to Electronic Data Processing for Business.* Princeton, N.J.: D. Van Nostrand Co., 1961.

HUFFMAN, HARRY; MULKERNE, DONALD J. D.: AND RUSSON, ALLIEN. *Office Procedures and Administration.* New York: McGraw-Hill, 1965.

INMAN, KENNETH L. *Fundamentals of Electronic Data Processing (A Programmed Text).* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

Introduction to Electronic Data Processing. Park Ridge, Ill.: Data Processing Management Association, 1962. Teacher's Manual and Student's Kit.

JOHNSON, H. WEBSTER. *How to Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KAHN, GILBERT. *Business Data Processing, Basic Principles and Applications.* New York: McGraw-Hill, 1966.

MCGILL, DONALD A. C. *Punched Cards: Data Processing for Profit Improvement.* New York: McGraw-Hill, 1962.

ROBICHAUD, BERYL. *Understanding Modern Business Data Processing.* New York: McGraw-Hill, 1966. Problems and Exercises, Teacher's Manual, and Key.

SAXON, J. A. AND STEYER, W. W. *Basic Principles of Data Processing.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

VAN NESS, ROBERT G. *Principles of Punched Card Data Processing.* Elmhurst, Ill.: The Business Press, 1962. (Secondary School Edition available also) Teacher's Manual.

WANOUS, S. J. AND WANOUS, EDWARD E. *Automation Office Practice.* Cincinnati: South-Western, 1964. Automation Office Practice Set and Manual.

WANOUS, S. J.; WANOUS, EDWARD E.; AND HUGHES, ART. *Introduction to Automated Data Processing.* Cincinnati: South-Western, 1967.

OFFICE MACHINES—COMPUTING AND DUPLICATING (OM)

Basic Skill for: Process-Description Writer, Title Clerk, Direct-Mail Specialist

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to develop mastery of the 10-key adding machine and simple duplicators. It also acquaints the trainee with other calculating machines and duplicators. The preparation of masters, stencils, and camera-ready copy (if typing skills are adequate) and the operation of certain duplication machines are both stressed. Where school facilities are limited, teachers should make arrangements to borrow machines at appropriate times during the course of study. Literature on duplicating equipment may be obtained from equipment manufacturers. Each trainee should be given an opportunity to choose the appropriate duplicating process for a piece of work, to prepare the materials, and to run certain machines. Trainees should be evaluated by means of objective tests, such as those found in many of the manuals and texts suggested in the teaching materials list. Observation by the teacher of the trainee's skill in using machines and equipment should be included in the evaluation. The Record of Completion should show the types of machines the trainee has used.

Standards of Achievement

1. Prepare masters, stencils, offset mats, and camera-ready copy. Operate spirit and fluid duplicators. Operate wet and/or dry process photocopiers.
2. Perform all operations proficiently on 10-key adding machines.
3. Operate rotary, printing, and electronic calculators.

Prerequisites for Study of Office Machines—Calculating and Duplicating

Trainee selection standards. Knowledge of typing would be helpful.

Topic Outline

I. Ten-Key Adding Machines and Printing Calculators
II. Rotary Calculators
III. Electronic Calculators
IV. Spirit Duplicators
V. Stencil Duplicators
VI. Dry and Wet Process Photocopiers
VII. Offset Process

TOPIC I. TEN-KEY ADDING MACHINES AND PRINTING CALCULATORS

A. When machines should be used
B. Adding by touch
C. Subtraction
D. Multiplication
E. Decimals and fractions, conversion
F. Division on printing calculator

TOPIC II. ROTARY CALCULATORS

A. When to use rotary calculators
B. Addition
C. Subtraction
D. Multiplication
E. Division
F. Fractions and decimals

TOPIC III. ELECTRONIC CALCULATORS

A. When electronic calculator should be used
B. Machine description
C. Operating principles
D. Skill development

TOPIC IV. SPIRIT DUPLICATORS

A. When to use spirit duplication (costs and use of copies) and limitations
B. Preparation of master (including paper backing)
C. Artwork on master (also indicate color processes available)
D. Correction of master
E. Operation and care of machine
F. Skill development

TOPIC V. STENCIL DUPLICATORS

A. When to use stencil duplication (costs and use of copies) and limitations
B. Preparation of stencil
C. Artwork on stencil
D. Operation and care of machine
E. Skill development

TOPIC VI. DRY AND WET PROCESS PHOTOCOPIERS

A. Dry process photocopiers
   1. Costs, limitations, and production rates
   2. Care of machine and supplies

B. Wet process photocopiers
   1. Costs, limitations, and production rates
   2. Care of machine and supplies
   3. Safety precautions needed for some machines

TOPIC VII. OFFSET PROCESS

A. When to use offset process
B. Preparation of mat and camera-ready copy
C. Versatility of process (quality, photo reproduction)

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

AGNEW, PETER L. *Machine Office Practice.* Cincinnati: South-Western, 1965. Practice Set.

AGNEW, PETER L. AND CORNELIA, NICHOLAS J. *Office Machines Course, 3rd ed.* Cincinnati: South-Western, 1962. Teacher's Manual and Test.

AGNEW, PETER L. AND MEEHAN, JAMES R. *Clerical Office Practice, 3rd ed.* Cincinnati: South-Western, 1961. Workbook, Achievement Tests, and Manual.

AGNEW, PETER L. AND PASEWARK, WILLIAM R. *Rotary Calculator Course, 4th ed.* Cincinnati: South-Western, 1962. Teacher's Manual and Test.

———. *Ten Key Adding-Listing Machine and Printing Calculator Course, 3rd ed.* Cincinnati: South-Western, 1963. Achievement Test and Manual.

ARCHER, FRED C.; BRECKER, RAYMOND F.; FRAKES, JOHN C.; AND STEWART, JEFFREY. *General Office Practice, 3rd ed.* New York: McGraw-Hill, 1968 (Chapters 5, 6, 17, 18, 19).

CANSLET, RUSSELL N. (ed.). *Fundamentals of Mimeographing.* Chicago: The School Department, A.B. Dick Co., 1963.

DOOL, J. J. *Business Machines Exercises.* New York: McGraw-Hill, 1964. Workbook and Solutions Manual.

FASNACHT, HAROLD D. AND BAUERNFEIND, HARRY B. *How To Use Business Machines, 2nd ed.* New York: McGraw-Hill, 1962. Workbook and Instructor's Key.

Learning How To Use Ditto–D–10 Duplicator. Chicago: Ditto, Inc.

MEEHAN, JAMES R. *Using Rotary Calculators in the Modern Office.* New York: McGraw-Hill, 1965. Workbook and Instructor's Guide.

MEEHAN, JAMES R. AND KAHN, GILBERT. *How To Use Adding Machines.* New York: McGraw-Hill, 1962. Workbook and Instructor's Guide.

PACTOR, PAUL. *Business Machines Projects.* New York: Pitman Publishing Corp., 1962.

PACTOR, PAUL AND JOHNSON, NIRA M. *Business Machines Course.* New York: Pitman Publishing Corp., 1961.

WALKER, ARTHUR L.; ROACH, J. KENNETH; AND HANNA, J. MARSHALL. *How To Use Adding and Calculating Machines, 2nd ed.* New York: McGraw-Hill, 1960. Workbook, Teacher's Manual and Key.

PROBLEM SOLVING TECHNIQUES (PSL)

Functional Knowledge for: All Trainees EXCEPT Safe Deposits Manager, Interviewer and Claims Adjuster

Hours Class: 1 hour daily; Laboratory: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit will introduce trainees to the factors involved in the solving of problems and the techniques to be applied. Methods for identifying and defining problems, as well as determining the need for their solutions, will be stressed. Problem solving will be explored as a basis for sound decisionmaking. Trainees should be given ample opportunity to practice techniques covered in lecture material, with emphasis directed at logical and critical thinking in each step of the solution process. Possible need for redefinition of problems should be pointed out, as well as means for determining optimum solution when alternatives are available. The teacher should endeavor to select laboratory assignments in areas with which trainees are familiar so that problems posed are realistic and factual, thereby obtaining maximum learning of the application of methods and procedures taught. Application to the trainees' practical work situations involving organization and personnel problems should be continuous. Teachers of this unit should have strong backgrounds in psychology, logic, the communication process, and group dynamics. Evaluation should be by objective test methods and by observation of trainee performance.

Standards of Achievement

1. Demonstrate knowledge of a specific problem-solving technique.
2. Identify eight factors causing blocks in problem solving.
3. Identify main elements or factors to be considered in applying problem solving techniques.

Prerequisites for Study of Problem Solving Techniques

One year of postsecondary education in business administration or equivalent administrative work experience.

Topic Outline

I. Introduction
II. Problem Definition and Analysis
III. Types of Problems
IV. Blocks to Problem Solving
V. Problem Solving Method
VI. Creativity and Problem Solving
VII. Group Problem Solving
VIII. The Solution

TOPIC I. INTRODUCTION

A. Problem solving—a continual process
B. History and progress
   1. Prehistoric man
   2. Inventions
   3. The industrial revolution
C. Everyday living and business
   1. Individual problems
   2. Problems of society
   3. Business organization problems
D. Automation—science and business
   1. Mass production
   2. Automatic machinery
   3. Computerization

TOPIC II. PROBLEM DEFINITION AND ANALYSIS

A. Problem recognition
   1. What
   2. Where
B. Problem specifications
   1. Description
   2. Ramifications
C. Causative factors
   1. Possible cause
   2. Probable cause
D. Factors involved in problem recognition
   1. Environmental
      a. Stimulus intensity
      b. Stimulus duration
      c. Hierarchial order of stimulus
      d. Physical obstacles
      e. Physical events
   2. Temporal
      a. Related to stimulus duration and order
      b. Related to needs, wants, drives, goals, motives
      c. Diurnal rhythms
      d. Expectancy fulfillment
   3. Personal
      a. Awareness of internal stimuli and tensions (needs, wants, satisfactions)
      b. Awareness of environmental phenomena
      c. Communication and clarification
      d. Intelligence and curiosity
      e. Attitudes, goals, feelings, and predisposition
      f. Foresight and insight
      g. Sum of personality
      h. Use of self-economy

TOPIC III. TYPES OF PROBLEMS

A. Cognitive process problems
   1. Intellectual curiosity drive
   2. Abstractions and orders of abstractions
   3. Symbol manipulation
      a. Verbal
      b. Images
   4. Hypotheses
   5. Validity
   6. Methodological
   7. Ethical and philosophical
B. Conflict of motives, drives, and cognitive process
C. Emotional problems
   1. Goal interference or conflict
   2. Motives and attitudes
   3. Needs and defense mechanisms
   4. Bias, prejudice, and value judgments
   5. Frames of reference
      a. Expectancies and opinions
      b. Past experience
   6. Communication
   7. Response to frustration
D. Interpersonal problems
   1. Personality conflict
   2. Communicational
   3. Acceptance and rejection
   4. Goal block
   5. Competition and hostility
   6. Intellectual disagreement
   7. Behavioral circularity
E. Organizational problems
   1. Planning
   2. Organizing
   3. Directing
   4. Controlling
   5. Delegating
   6. Appraising
   7. Value judgments
   8. Power status
F. Transactional problems
   1. Production and sales
   2. Scientific
   3. Financial

4. Ethical
5. Innovational

G. Esthetic problems

TOPIC IV. BLOCKS TO PROBLEM SOLVING

A. Mechanization—lack of flexibility; rigidly continued behavior
B. Functional fixedness—inability to see new use for familiar method or tool
C. Reaction to frustration
D. Stress perception
E. Education, experience, exposure
F. Recall and retention
G. Attitude, bias, prejudice, opinion
H. Semantics
I. Preconceptions and assumptions
J. Lack of awareness
K. Incomplete information
L. Ignoring alternatives
M. Failure to consider all data
N. Faulty reasoning
O. Defense mechanisms
P. Value judgments

TOPIC V. PROBLEM SOLVING METHOD

A. Identification of problem
B. Determination of what and who is involved
C. Evaluation and consolidation of issues
D. Accumulation of data—fact-finding
E. Determination of relationship, causes to behavior
F. Determination of appropriate action and follow-up

TOPIC VI. CREATIVITY AND PROBLEM SOLVING

A. The creative process
B. Departure from traditional approaches
C. Exercise of imagination
D. Nonjudgmental processes
E. Group versus individual activity
F. Structured versus unstructured situations
G. "Piggy-backing"
H. Incubation period

TOPIC VII. GROUP PROBLEM SOLVING

A. Fundamentals of problem solving conferences
B. Influence patterns
C. Communication blocks
D. Attitudinal blocks
E. Dominants versus submissives

TOPIC VIII. THE SOLUTION

A. Reach a decision
   1. Determination of permanency
   2. Determination of responsibility for action
B. Communicate results
   1. Responsibility for dissemination of information
   2. Channels and recipients of information
C. Action plan
   1. Organizational components involved or concerned
   2. Individuals concerned
   3. Risk factors involved in implementation
   4. Action timetable
      a. For initiation of plan
      b. Duration
      c. Review date
D. Review or followup
   1. Degree to which objectives have been met
   2. Evident results or lack of them
   3. Modifications necessary
   4. Determination of future action

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BAKER, SAMM SINCLAIR. *Your Key to Creative Thinking: How To Get More and Better Ideas.* New York: Harper and Row, 1962.

BERGEN, GARRET AND HANEY, WILLIAM V. *Organizational Relations and Management Action.* New York: McGraw-Hill, 1966.

BROWN, LELAND. *Communicating Facts and Ideas in Business.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

COLLINS, BARRY E. AND GUETZKOW, HAROLD. *A Social Psychology of Group Processes for Decision-Making.* New York: John Wiley and Sons, 1964.

GOLDNER, BERNARD B. *The Strategy of Creative Thinking.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

HARPER, R. J. C.; ANDERSON, C. C.; CHRISTIANSEN, C. M.; AND HUNKA, S. *The Cognitive Process: Readings.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

LEAVITT, HAROLD J. *The Social Science of Organizations: Four Perspectives.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

MORGAN, JOHN S. *Getting Across to Employees.* New York: McGraw-Hill, 1964.

OSBORN, ALEX. *Applied Imagination.* New York: Charles Scribner's Sons, 1953.

RICHARDS, MAX D. AND GREENLOW, PAUL. *Management Decision Making.* Homewood, Ill.: Richard D. Irwin, Inc., 1966.

SMITH, HENRY CLAY. *Sensitivity to People.* New York: McGraw-Hill, 1966.

TIFFIN, JOSEPH AND MCCORMICK, E. J. *Industrial Psychology, 5th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

YATES, AUBREY J. *Frustration and Conflict.* New York: John Wiley and Sons, 1962.

PUBLIC SPEAKING (PS)

Basic Skill for: Bank Cashier, Insurance Office Manager, Branch Manager, Budget Officer, Financial Institution Manager, Industrial Organization Manager, Treasurer, Account Executive

Hours Class or Laboratory: 1 hour daily — Total: 40 hours

Description and Teaching Suggestions

To speak well in public requires not only a knowledge of the fundamentals of public speaking, but also intensive guided practice. The emphasis in this unit should be on practice presentations. Trainees should be given ample opportunities to prepare and deliver speeches for audiences selected by the teacher.

At the outset, the trainees (with the help of the teacher) should develop a list or chart of criteria to be used for guidance when presenting or observing speeches. Several copies of the list or chart should be given to each trainee. Prior to delivering each prepared speech, a trainee should submit a copy of the list to the teacher for recording comments made during the critique that should follow each speech. The teacher should record his own evaluation on the list, as well as those made by the class, and then return it to the trainee for review and help in preparing and delivering the next talk.

The teacher must plan for and assign a number of trainee speeches each laboratory hour in order to afford maximum opportunity for practice. The time element should be flexible. If the period of actual classroom instruction lasts less than an hour, the additional time should be incorporated into the laboratory phase. Trainee speeches should, as often as possible, pertain to actual problems or situations that would be encountered at work.

Some suggested activities that teachers may wish to undertake are:

1. Assign the preparation and delivery of a speech requiring a visual aid. Discuss ways to achieve visual effectiveness; e.g., handling of object, size of object, distance at which object is held, etc. This is particularly effective for early speeches because the movements necessary to illustrate the visual aid tend to overcome fear and give the speaker a feeling of security.
2. Assign, well in advance, a speech requiring library research, notetaking, and the preparation of an outline. The teacher should provide experience in the use of the library by assigning short research projects.
3. Assign the class to study a number of outstanding speeches, and develop criteria governing the selection of a topic in terms of audience, occasion, time, and speaker.
4. Have trainees analyze advertisements and articles on controversial topics in newspapers and magazines. Evaluate statistics, authority, and reasoning employed.
5. Assign trainees to observe a speaker in person or on TV. Next day in class, evaluate the speaker's techniques, etc.

No amount of preparation or organization can overcome ineffective delivery. Trainees need instruction in poise, posture, gesture, projection, and articulation. Since microphones are often used, some instruction is necessary in proper "mike" technique. Again it must be emphasized that practice followed by intelligent criticism, followed by further practice is more important than precept.

The topics in this unit need not be followed in the sequence presented in the outline; all are interrelated. The teacher should present content and concepts as appropriate to the progress of the class. Individual differences and experiences among trainees should be carefully noted and adjustments made to allow each trainee to progress at his own rate.

Standards of Achievement

1. Demonstrate ability to use speech research techniques.
2. Organize and outline speech ideas in an effective manner.
3. Demonstrate ability to speak impromptu, extempore, from prepared script, and from memory.
4. Demonstrate acceptable platform presence during a speech presentation.
5. Demonstrate flexibility in presenting speeches to different selected audiences.

Prerequisites for Study of Public Speaking

Trainee selection standards.

Topic Outline

I. Speaking in Public
II. Understanding and Adjusting to Audiences
III. Criteria for Speech Topic Selection
IV. Research Techniques for Speech Preparation
V. Evaluating Validity of Researched Material

VI. Outlining a Speech
VII. Organizing a Speech
VIII. Style
IX. Delivery

TOPIC I. SPEAKING IN PUBLIC

A. Reasons for speaking in public
   1. Inform
   2. Entertain
   3. Convince
   4. Persuade
   5. Inspire
   6. Honor an individual
   7. Remind of a particular event
   8. Introduce another speaker
   9. "For the record"
B. Methods of presenting speeches
   1. Reading from a manuscript
   2. Memorized delivery
   3. Impromptu delivery
   4. Extemporaneous delivery
C. The importance of platform presence
D. Recorded or cited speeches

TOPIC II. UNDERSTANDING AND ADJUSTING TO AUDIENCES

A. Appraisal of audience
   1. Favorable to speaker
   2. Unfavorable to speaker
   3. Disinterested in speaker or topic
   4. Extent of audience's knowledge of subject
   5. Degree of involvement of audience with subject
B. Differences in audience
   1. Maturity
   2. Cultural background
   3. Educational background
   4. Size
C. Physical arrangement of audience for sight and sound
D. Bases for appeals to audience
   1. Duty
   2. Honor
   3. Loyalty
   4. Security
   5. Love
   6. Prestige
   7. Enlightened self-interest
   8. Action orientation
   9. Others
E. Adapting presentation to audience differences
F. Practice exercises to selected audiences using different appeals, vocabulary, facts, statistics, and examples

TOPIC III. CRITERIA FOR SPEECH TOPIC SELECTION

A. Appropriate for audience
B. Appropriate for occasion
C. Time required for preparation
D. Time required for presentation
E. Status of speaker in relation to topic
F. Conformance of topic to general purpose of speech—inform, entertain, etc.
G. Conformance of topic to specific purpose of speech—to get votes, to acquire or purchase something, to raise money, etc.

NOTE: Trainees should be assigned practice exercises in speech preparation, using criteria identified under the topic for both general and specific purposes and for a variety of selected audiences.

TOPIC IV. RESEARCH TECHNIQUES FOR SPEECH PREPARATION

A. Speaker's recognition of personal limitations
   1. Memory
   2. Cogency of arguments
   3. Limitation of personal experience
   4. Statistics
B. Importance of research
C. Reference sources
   1. Card catalog
   2. Reference books
   3. Readers' Guide to Periodical Literature
   4. Vertical files
   5. Newspaper "morgues"
   6. Interviews
   7. Books of quotations
   8. Abstracts
D. Notetaking during research
   1. Material
      a. Facts and statistics pertinent to topic
      b. Opinions
      c. Quotations
      d. Examples
   2. Methods to be used
      a. Paraphrasing
      b. Copying verbatim
   3. Identification of source
      a. Author and title
      b. Person and place
      c. Dates of publication
      d. Page numbers
      e. Other means of identifying source of material

TOPIC V. EVALUATING VALIDITY OF RESEARCHED MATERIAL

NOTE: Since speakers bear the responsibility of being ethical in their arguments, they must be trained to judge the validity of the facts, authorities, statistics, and examples used to win the belief of the audience. It is often impossible for the speaker to check on the reliability of the "proof" he selects and uses; therefore, he must develop criteria to determine the truth of each item. Suggested practice in use of a questioning approach is shown below.

A. Judging the validity of facts
   1. Is there a high degree of probability that the fact is as asserted?
   2. Can the asserted fact be investigated by other observers?
   3. Is the reporting of the asserted fact complete?

B. Judging the validity of authority
   1. Is the authority qualified?
   2. Is the authority in a position to know or interpret the facts?
   3. Is the authority unbiased?
   4. Is the authority supported by other evidence or authority?

C. Judging the validity of statistics
   1. Do the statistics cover a sufficient number of cases?
   2. Are the statistics taken from a reputable source?
   3. Are the statistics open to objective examination?
   4. Are the statistics relevant to the problem under discussion?
   5. Do the statistics refer to comparable items?

D. Judging validity of examples
   1. Are the examples typical?
   2. Do the examples represent a large enough sampling to justify generalization?
   3. Are there contrary examples which have not been considered?

TOPIC VI. OUTLINING A SPEECH

NOTE: A speech outline serves as a guide to the order or sequence of arguments to be used and indicates the approximate time to be devoted to each. Trainees should be drilled on the preparation of outlines to develop skills in determining sequence, emphasis, and subordination. Drills or exercises should be devised to provide practice in these skills. Although there are a number of outlining systems, the one system which is suggested is the Harvard Outline.

A. Different systems
   1. Logic of system
   2. Consistency in use of symbols

B. Methods
   1. Key words
   2. Key phrases
   3. Full sentences
   4. Combinations

C. Format

TOPIC VII. ORGANIZING A SPEECH

A. Importance of the three phases
   1. Introduction
   2. Body of speech—development of ideas
   3. Conclusion

B. Introducing the speech
   1. Stating purpose
   2. Gaining and holding interest
   3. Types of openings
      a. Startling statements
      b. Suspense
      c. Pertinent questions
      d. Quotations
      e. Illustrations
      f. Personal reference
      g. Humorous reference
      h. Opening directly into subject
      i. Statement of purpose of speech
      j. Reference to occasion
      k. Use of a visual aid
      l. Issuance of challenge to audience
      m. Immediate appeal to self-interest of audience

NOTE: Each trainee should practice employing several of these openings, but should be encouraged to use those types which are easiest and most natural for him.

C. Developing body of speech
   1. Selecting important ideas
      a. Limiting number of ideas to be presented
      b. Making important ideas clear and definite
      c. Achieving purpose of speech by choosing pertinent ideas
   2. Arranging ideas in proper sequence
   3. Selecting supporting material
      a. Facts
      b. Examples
      c. Paraphrasing or quoting authorities
      d. Interest value of supporting material
   4. Arranging supporting material in proper sequence

D. Concluding speech
   1. Summarizing
   2. Appealing for action
   3. Appealing to values
   4. Appealing to emotion
   5. Predicting
   6. Quoting others

7. Employing humor
8. Presenting an application of an idea
9. Emphasizing importance of proposal
10. Leaving audience with a question

NOTE: Trainees should practice a variety of ways of closing their speeches appropriately.

TOPIC VIII. STYLE

A. Styling—an individual characteristic
   1. Avoiding overshadowing of content by personality of speaker
   2. Using structure, language, and rhetoric
B. Structure
   1. Unity
   2. Coherence
   3. Emphasis
C. Language
   1. Simple
   2. Shortness of sentences
   3. Choice of vocabulary
      a. Within understanding range of audience
      b. Vividness
   4. Elimination of cliches and trite expressions
D. Rhetoric
   1. Rhetorical questions
   2. Repetitions
   3. Allusions
   4. Analogies
   5. Examples
   6. Stories
   7. Specific instances or examples
   8. Concreteness of terms
   9. Humor
   10. Comparison and contrast
   11. Pauses and emphasis

TOPIC IX. DELIVERY

A. Visual aspects (platform presence)
   1. Eye contact
   2. Appearance
   3. Posture
   4. Gestures
   5. Facial expressions
   6. Control of mannerisms
B. Vocal aspects
   1. Volume
   2. Pitch
   3. Rate
   4. Emphasis and subordination
   5. Articulation
   6. Projection

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BAIRD, C. AND KNOWER, F. H. *General Speech, 3rd ed.* New York: McGraw-Hill, 1963. Correlated Textfilm Series, 3 motion pictures, BW.

BLANKENSHIP, JANE. *Public Speaking: A Rhetorical Perspective.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

BRIGANCE, W. N. *Speech: Its Techniques and Disciplines in a Free Society, 2nd ed.* New York: Appleton-Century-Crofts, 1961.

CAPP, GLENN R. *How To Communicate Orally, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

COPELAND, L. AND LAMM, L. *The World's Great Speeches, 2nd ed.* New York: Dover Publications, 1958.

MCBURNEY, JAMES H. AND WRAGE, ERNEST J. *Guide to Good Speech, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

MILLS, G. E. AND BAUER, O. F. *Guidebook for Student Speakers.* New York: Ronald Press, 1966.

PETERSON, H. A. *Treasury of the World's Greatest Speeches.* New York: Simon and Schuster, 1965.

ROSS, R. S. *Speech Communication: Fundamentals and Practice.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

SANDFORD, W. P. AND YEAGER, W. H. *Principles of Effective Speaking, 6th ed.* New York: Ronald Press, 1963.

THONSSEN, L. AND FINKEL, W. L. *Ideas That Matter: A Sourcebook for Speakers.* New York: Ronald Press, 1961.

WEAVER, A. T. AND NESS, O. G. *An Introduction to Public Speaking.* New York: Odyssey Press, 1961.

It is suggested that copies of Bartlett's *Book of Familiar Quotations*, Roget's *Thesaurus*, and standard dictionaries be available for trainee use.

RECORDS MANAGEMENT (RM)

Specialized Functional Requirement for: All Trainees EXCEPT Process-Description Writer, Interviewer and Claims Adjuster, Account Executive, Direct-Mail Specialist

Hours Class: 1 hour daily

Total: 20 hours

Description and Teaching Suggestions

This unit is designed to make trainees aware of the scope of records management. It introduces them to the need for a records management program in government and industry and to the dimensions of a full-fledged program in an industrial organization. This unit can be coordinated with the units on Forms

Design and Procedures Writing. Supervisory and administrative managers may either assist executives or may personally set up and maintain records management programs in smaller firms. Much of this unit should be devoted to class discussion. Lectures by the teacher or professional records management people are suggested. Emphasis should be placed on actual exercises in those areas of the subject that call for skill development. Objective tests can be used to evaluate the trainee's acquisition of subject knowledge.

Standards of Achievement

1. Demonstrate knowledge of purpose and scope of records management programs.
2. Demonstrate knowledge of the details, procedures, and methods used in setting up records management programs and the various types of equipment that may be used advantageously.
3. Demonstrate ability to develop retention schedules.

Prerequisites for Study of Records Management

Trainee selection standards.

Topic Outline

I. Records Management (General)
II. The Parts of a Records Management Program
III. Developing and Maintaining a Records Management Program
IV. Records Surveys
V. Supplies and Equipment
VI. Protection of Records
VII. Automated Equipment in a Records Management Program

TOPIC I. RECORDS MANAGEMENT (GENERAL)

A. Importance of records management
   1. Evolution of records management programs
   2. Records management in the business organization
   3. Basic needs for records management: records retention, retrieval, file deletion, and control at all phases
B. Theories and principles of paperwork simplification
C. Analysis and evaluation of records
   1. Active
   2. Inactive
   3. Vital
   4. Confidential and secret

TOPIC II. THE PARTS OF A RECORDS MANAGEMENT PROGRAM

A. Files management
   1. Creation and use
   2. Standardization
   3. Centralization
   4. Costs
B. Inventories of types, quantities, and locations of records
C. Retention and transfer schedules and procedures
D. Design and operation of records centers
   1. Local
   2. Remote
   3. Archives
   4. Company libraries or collections

TOPIC III. DEVELOPING AND MAINTAINING A RECORDS MANAGEMENT PROGRAM

A. Defining the scope of the program
   1. Needs and goals
   2. Policies and guidelines
   3. Authority and accountability
   4. Schedule for developing program phases and achieving goals; setting priorities
   5. Organization and personnel involved
   6. Need for professional consultants
B. Program promotion
   1. Advisory committee
   2. Involvement of supervisors
   3. Departmental representation
C. Negotiating program phases as they involve personnel and departments throughout the firm (the human relations problem)
D. Program evaluation and modification
E. Written procedures

TOPIC IV. RECORDS SURVEYS

A. The dynamics of interviewing for gathering information
B. Taking inventory of records throughout the firm
   1. Schedule
   2. Line participation
   3. Specialists
C. Classifying types of records
D. Implementing survey findings
E. Records retention and disposition schedules

TOPIC V. SUPPLIES AND EQUIPMENT

A. Active files
   1. Folders and guides
   2. Filing equipment

3. Miscellaneous (card records, labels, file compressors, dividers, follow blocks)

B. Transfer and storage equipment

C. Records copier (wet, dry, chemical)

D. How to develop a file of equipment sources and manufacturers

E. Automated and electronic equipment (see topic VII)

TOPIC VI. PROTECTION OF RECORDS

A. Against fire

B. Against dust, humidity, and general deterioration

C. Against theft

D. Against other types of disasters

TOPIC VII. AUTOMATED EQUIPMENT IN A RECORDS MANAGEMENT PROGRAM

A. Microfilming

B. Automatic information retrieval systems

1. Indexing problems
2. Keyword indexing concepts

C. One-system concepts

1. Online stations
2. Maximum utility with minimum manual manipulation or duplication

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BASSETT, ERNEST D.; AGNEW, PETER L.; AND GOODMAN, DAVID G. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1964. Filing Office Practice Set, Final Examination, Placement Tests, and Manual.

BECKER, J. AND HAYES, R. M. *Introduction to Information Storage and Retrieval: Tools, Elements, Theories.* New York: John Wiley and Sons, 1963.

BLEGEN, AUGUST H. *Records Management.* Stamford, Conn.: Office Publications, Inc. 1965.

FREEMAN, D. H., JR. *Reference Manual on a Practical Approach to Information and Data Retrieval.* Boston: Industrial Education Institute, 1963.

GRIFFIN, M. C. *Records Management: A Modern Tool for Business.* Boston: Allyn and Bacon, 1964.

JOHNSON, MINA M. AND KALLAUS, NORMAN F. *Records Management.* Cincinnati: South-Western, 1966. Manual.

KAHN, GILBERT; YENAN, THEODORE; AND STEWART, JEFFREY. *Progressive Filing and Records Management.* New York: McGraw-Hill, 1962.

LAZZARO, VICTOR (ed.). *Systems and Procedures: A Handbook for Business and Industry.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

LEAHY, EMMETT J. AND CAMERON, CHRISTOPHER A. *Modern Records Management.* New York: McGraw-Hill, 1965.

LITTLEFIELD, C. L. AND RACHEL, F. M. *Office and Administrative Management: Systems Analysis, Data Processing, and Office Services, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

PLACE, IRENE AND POPHAM, ESTELLE. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

STRONG, EARL P. *Increasing Office Productivity.* New York: McGraw-Hill, 1962.

SPECIALIZED OFFICE EDUCATION UNITS

Specialized office education units are designed to provide the skills, knowledge, and attitudes needed by trainees who elect specific jobs in the occupational field. These areas of specialization are budgeting, purchasing, corporate insurance, financial planning, and similar topics.

The units can be studied according to the suggested training for each position or they can be selected for the individual trainee on the basis of need. These units should be especially useful for refresher or upgrading purposes, or for the continuation of specialized education by trainees in the occupational field.

BUDGETING (B)

Specialized Skill for: Account Executive, Administrative Assistant, Office Manager, Branch Manager, General Foreman, and all Level III jobs Except Direct-Mail Specialist

Hours Class: 2 hours daily

Total: 40 hours

Description and Teaching Suggestions

This unit introduces trainees to the use of budgeting as a management tool and illustrates the techniques necessary to create an effective budgetary reporting system.

While a great deal of the subject matter is conceptual, a large portion can be learned effectively by practice. Accordingly, while discussion of subject matter is important, teachers should review the actual preparation of budgets. If possible, the practical work undertaken should relate to a continuous problem unified throughout the various sessions. This approach would illustrate that a budget is one *overall* tool for management's planning, coordination, and control.

Practical problems assigned in specific areas of budgeting should relate to the same assumed circumstances so that upon completion of all practical problems, a total budget for a given company will have been completed.

Sessions should emphasize *practice* so that the practical work may be reviewed and/or performed in depth. While it will be desirable to do some detail work in class, it would be helpful to compile certain detailed schedules, provided that assignments could be given in advance.

Problems and other materials which are used by the teachers should be duplicated or ordered in advance. As an alternative, texts which contain practical problems can be assigned to the trainees, with the problems designated in advance.

Occasional quizzes are suggested to uncover areas of weakness.

It should be noted that *while the topical outline is geared towards a budget for a manufacturing company*, the techniques developed can also be used in preparing budgets for service companies and for governmental divisions.

Standards of Achievement

1. Demonstrate knowledge of the role of budgets.
2. Know the objectives of budgeting programs.
3. Exhibit a working knowledge of the principles of effective budgeting.
4. Know the various types of budgets.
5. Demonstrate ability to prepare effective budgetary reports.

Prerequisite for Study of Budgeting

Trainee selection standards.

Topic Outline

I. Introduction to Budgeting
II. Sales Budgets
III. Production Budgets
IV. Expense Budgets

V. Budgeted Income Statements
VI. Budgets of Assets
VII. The Budgeted Balance Sheet
VIII. Control Through Variable Budgets

TOPIC I. INTRODUCTION TO BUDGETING

A. The purpose of budgeting
B. Advantages gained by business budgeting
   1. Planning
   2. Coordination
   3. Control through reports of variances
C. The budget as a communications device
D. Essentials of successful budgeting
   1. Sound organization
   2. Research and analysis
   3. Support of major executives
E. Applicability of budgeting to business
F. Period covered by the budget
   1. Long-range plans
   2. Short-range plans
G. Responsibility for preparation of budgets

TOPIC II. SALES BUDGETS

A. Responsibility for the sales budget
B. As a beginning point in the overall plan
C. Steps in planning
   1. Study of general economic conditions
   2. Sales estimate for industry
   3. Sales estimate for company
      a. Executive opinion
      b. Sales force opinion
      c. Sales division supervisors' opinion
      d. Statistical methods
      e. Historical data as support for estimates
   4. Need for sales estimates by
      a. Time period
      b. Product lines
      c. Sales territories
      d. Salesmen
D. Need for company to have ability to meet demands of budgeted sales
E. Relationship of sales budget to master budget
   1. Various forms and techniques for budget preparation
   2. Drill in preparation of sales budget

TOPIC III. PRODUCTION BUDGETS

A. Timing of preparation of production budget
B. Schedule of quantities to be produced
   1. Need for management to specify desired inventory levels
   2. Schedule prepared by product lines
   3. Schedule as base for preparation of other elements of production budget
C. Direct materials budget
   1. Definition of direct materials (versus supplies) budget
   2. Need to determine raw (direct) materials requirements based on determination of quantities to be produced
   3. Consideration of materials needed
D. Purchases budget
   1. Definition of purchases budget
   2. Production needs determine purchases budget
   3. Schedule coordination of purchases with product
   4. Obtaining purchase prices
E. Direct labor budget
   1. Definition of direct labor budget
   2. Direct labor needs established by determination of units to be produced
   3. Provision to be made for various product lines as well as different organizational responsibility
F. Manufacturing expense (overhead) budgets
   1. Definition of manufacturing expense
   2. For producing departments
   3. For service departments
G. Drill in preparation of production budget

TOPIC IV. EXPENSE BUDGETS

A. Definition of expense budget
B. Selling expense budget
   1. Relation to sales budget
   2. Preparation by functional item as well as along territorial lines
   3. Portions of service department overhead applicable to selling expenses
C. Administrative expense budget
   1. Analysis by department (responsibility) as well as by function (item classification)
   2. Portions of service department overhead applicable to administrative expenses should be provided for in budget
D. Review of preparation of sales budget

TOPIC V. BUDGETED INCOME STATEMENTS

A. Definition of budgeted income
B. Preparation following completion of sales, production, and expense budgets
C. Sources of data necessary for preparation of budgeted income statements: (sales, production, and expense budgets)

D. Support for preparation of income statement—various budget schedules support preparation of income statement by responsibility and products
E. Provision for taxes in budgeted income statement
F. Use of budgeted income statement in evaluating the soundness of the financial plan
G. Class drill on preparation of budgeted income statement based on previously prepared schedules

TOPIC VI. BUDGETS OF ASSETS

A. Cash budget
   1. Purpose
      a. Indication of probable cash position and needs for borrowing
      b. Provision for control of cash
      c. Coordination for effective use of cash
   2. Preparation
      a. Techniques in estimating sources of receipts
      b. Techniques in estimating required disbursements

NOTE: Point out that cash receipts and disbursements estimates are naturally related to the income statement schedules.

   3. Review preparation of cash budgets
B. Capital additions budget
   1. Responsibility for capital additions budget
   2. Control of capital additions
   3. Techniques for initiation and approval of capital additions budget requests
   4. Review preparation of capital additions budget

TOPIC VII. THE BUDGETED BALANCE SHEET

A. Budgeted balance sheet results from preparation of budgeted income statements and related schedules
B. Beginning point is balance sheet at beginning of budgeted period
C. Supporting schedules for key balance sheet items
   1. Cash—cash budget
   2. Accounts receivable—schedule of cash collections of receivables
   3. Inventories—production budget
   4. Fixed assets—capital additions budget
   5. Accounts payable—schedule of cash disbursements
D. Budgeted retained earnings statement prepared in connection with budgeted income statements and balance sheets
E. Purpose of budgeted balance sheet is forecast of financial condition
F. Review preparation of budgeted balance sheets

TOPIC VIII. CONTROL THROUGH VARIABLE BUDGETS

A. Concepts underlying the variable budget
B. Definition of terms
   1. Fixed costs
   2. Variable costs
   3. Semivariable costs
C. Methods of expressing variable budgets
   1. By presentation of multiple budgets for various levels of activity
   2. By formula
   3. By graph
D. Methods of determining cost variability
   1. Estimates
   2. Budgeted high- and low-point methods
   3. Correlation methods

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available materials), select trainee and teacher materials for use in this unit.

ANTHONY, ROBERT N.; DEARDEN, JOHN; AND VANCIL, RICHARD F. *Management Control Systems*. Homewood, Ill.: Richard D. Irwin, Inc., 1965. Book contains cases and readings.

BACKER, MORTON AND JACOBSEN, LYLE E. *Cost Accounting: A Managerial Approach*. New York: McGraw-Hill, 1964.

BURKHEAD, JESSE. *Government Budgeting*. New York: John Wiley and Sons, 1956.

DEARDEN, JOHN. *Cost and Budget Analysis*. Englewood Cliffs, N.J.: Prentice-Hall, 1962.

HECKART, J. BROOKS AND WILLSON, JAMES D. *Business Budgeting and Control, 3rd ed.* New York: Ronald Press, 1967.

HORNGREN, CHARLES T. *Cost Accounting—A Managerial Emphasis*. Englewood Cliffs, N.J.: Prentice-Hall, 1962.

KNIGHT, W. D. AND WEINWURM, E. H. *Managerial Budgeting*. New York: Macmillan, 1964.

MATZ, ADOLPH; CURRY, OTHEL J.; AND FRANK, GEORGE W. *Cost Accounting, 4th ed.* Cincinnati: South-Western, 1967.

SHILLINGLAW, GORDON. *Cost Accounting, rev. ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1967.

WELSCH, GLENN A. *Budgeting, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

BUSINESS CONTRACT LAW (BCL)

Functional Knowledge for: Bank Cashier, Escrow Officer, Junior Executive, Loan Counselor, Title Clerk, Trainee Manager, Administrative Assistant, Branch Manager, Chief Credit Analyst, Contract Specialist, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Trust Officer, Purchase-Price Analyst, and all Level III jobs, EXCEPT Direct-Mail Specialist

Hours Class: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

In this unit, trainees will be familiarized with the fundamentals of contract law so as to understand the foundation for other branches of commercial law. Through the definition of terms peculiar to this area of commercial and industrial administration, clarification of the legal bases of business transactions will be achieved.

Teachers should extend every effort to employ case history technique to illustrate applications of contract law in day-to-day business operations. Wherever possible, guest lecturers from the industrial community should be invited—preferably corporate counsels, secretaries, or financial executives who (by the nature of their professional capacity) will provide practical examples to supplement classroom theory. Class discussion based on seminar technique should prove most valuable to trainees.

Standards of Achievement

1. Demonstrate basic understanding of contracts by being able to define each type of contract and explain its elements.
2. Define and give examples of formal and informal contracts.
3. Explain the meaning of a proposal or offer, both unilateral and bilateral.
4. Define "consideration" and explain its essentiality as an element of a contract.
5. Explain difference between voidable and void contracts.
6. In contract law, define "infant."
7. Write a paper on the elements of fraud, using examples of intentional fraud and misrepresentation.
8. Define coercion and duress as they apply to contracts.
9. Discuss factors which would tend to render a contract unenforceable.
10. Exhibit understanding of a condition precedent, including determining factors.
11. Define assignment, and explain positions of assignors and assignees.
12. Explain the discharge of a contract, and illustrate three methods of discharge.
13. Discuss the nature of bankruptcy.
14. Explain the effect of bankruptcy on contract liability.

Prerequisites for Study of Business Contract Law

Two years of college, or equivalent experience in the occupational field.

Topic Outline

I. Introduction to Contracts
II. Proposals
III. Acceptance
IV. Doctrine of Consideration
V. Competency of Contractors
VI. Illegal Contracts
VII. Contract Conditions
VIII. Third Parties
IX. Contract Discharge

TOPIC I. INTRODUCTION TO CONTRACTS

A. Definition of contracts
B. Types of contracts
   1. Formal
   2. Informal
   3. Executed and executory
   4. Implied
   5. Quasi-contract
C. Contract elements

TOPIC II. PROPOSALS

A. Definition of a proposal
B. Necessity for communication of an offer
C. Mutuality of understanding
D. Unilateral and bilateral proposals
E. Continuation of a proposal
F. Termination of a proposal

TOPIC III. ACCEPTANCE

A. Definition of an acceptance
B. Conformance to terms of proposal
C. Effective time

TOPIC IV. DOCTRINE OF CONSIDERATION

A. Definition of consideration
B. Binding by seal
C. Adequacy

TOPIC V. COMPETENCY OF CONTRACTORS

A. Definition of competency
B. Exclusions
C. Void versus voidable contracts
D. Misrepresentations and fraud
E. Error
F. Coercion and duress

TOPIC VI. ILLEGAL CONTRACTS

A. Definition of an illegal contract
B. Enforceability
C. Types
D. Exceptions

TOPIC VII. CONTRACT CONDITIONS

A. Definition of conditions
B. Breach of contract
C. Installment performance
D. Partial performance
E. Damages

TOPIC VIII. THIRD PARTIES

A. Definition of a third party
B. Assignors and assignees
C. Monetary claims
D. Rights of the individual
E. Notification of rights to third party
F. Third party benefit contracts

TOPIC IX. CONTRACT DISCHARGE

A. Termination of contract
   1. Completed performance
   2. Novation
   3. Cancellation
B. Bankruptcy

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

DELAVOU, E. R. AND HOWARD, C. G. *Principles of Business Law, 5th ed.* New Jersey: Prentice-Hall, 1952.

FISK, J.; MCKEE, T.; AND SNAPP, JAMES C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, Examinations, and Manual.

GETZ, GEORGE. *Business Law, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall.

GOODMAN, KENNARD E. *Today's Business Law, 2nd ed.* New York: Pitman, 1961.

ROSENBERG, R. ROBERT AND OTT, WILLIAM G. *College Business Law, 3rd ed.* New York: McGraw-Hill, 1966. Tests, Teacher's Manual, and Key.

BUSINESS FORECASTING (BF)

Specialized Skill for: Administrative Assistant, Branch Manager, Financial Institution Manager, Procurement Services Supervisor, Budget Officer, Treasurer, Industrial Organization Manager

Hours Class: 2 hours daily Total: 20 hours

Description and Teaching Suggestions

Trainees will be introduced to the concepts and techniques of business forecasting. Attention will be focused on the need for forecasting in establishing goals, directions, and programs.

Discussions should relate to the steps involved in forecasting as well as to a review of accepted forecasting methods. The methods reviewed should include formal and informal approaches to forecasts.

Class time should be devoted to both problem solving and discussions. During discussions, it is suggested that the teacher act as a moderator, enabling the students to exchange ideas. The trainees should be encouraged to solve cases and problems which present forecasting situations.

Problems and cases selected should be duplicated or ordered in advance so that they may be distributed to the trainees. Also, texts containing cases and problems may be suggested to the trainees from among the material listed under *Texts and Other Teaching Materials* at the end of this unit.

Periodic quizzes are suggested to uncover areas of weakness.

Standards of Achievement

1. Know the general principles of business forecasting.

2. Demonstrate knowledge of steps in the forecasting process.
3. Exhibit familiarity with various forecasting methods.
4. Know sources of information on business conditions.
5. Demonstrate knowledge of the relationship of forecasts to budgeting and preparation of forecasted financial statements.
6. Be able to demonstrate postforecast audit and followup techniques.

Prerequisites for Study of Business Forecasting

Trainee selection standards.

Topic Outline

I. Introduction to Business Forecasting
II. Steps in the Forecasting Process
III. Distinction Between Long-Range and Short-Range Forecasts
IV. Forecasting Methods
V. Sources of Information on Business Conditions
VI. Forecasted Financial Statements
VII. Postforecast Audit and Followup

TOPIC I. INTRODUCTION TO BUSINESS FORECASTING

A. Forecasting in general
  1. Evaluation of present objectives
  2. Evaluation of future objectives
  3. Preparing for the future
B. The relationship of forecasting and planning
C. The role of forecasting in business
  1. Decisions on long- and shortrun objectives
  2. Study of conditions likely to prevail
    a. Business
    b. Economic
    c. Social
  3. Reaching desired goals
    a. Establishing programs
    b. Establishing policies
    c. Establishing directions
D. Phases in forecasting
  1. Practical evaluation of future conditions
  2. Judgment as to future conditions
  3. Altering or fitting future actions of the firm to conditions forecasted

TOPIC II. STEPS IN THE FORECASTING PROCESS

A. Demand analysis
  1. By product
  2. By territory
  3. By customer
  4. By salesman
B. Sales forecast
  1. By product
  2. By territory
  3. By customer
  4. By salesman
  5. Factors in sales analysis
    a. Secular trend
    b. Seasonal variations
    c. Cyclical trend
    d. Random, accidental, or residual fluctuations
C. Manpower forecast
  1. Evaluation of manpower needs
  2. Relationship to sales forecast
D. Production forecast
  1. Evaluation of production needs
  2. Relationship to sales forecast
E. Financial forecast
  1. Evaluation of working capital needs
  2. Evaluation of fixed capital needs
  3. Evaluation of cash flows

TOPIC III. DISTINCTION BETWEEN LONG-RANGE AND SHORT-RANGE FORECASTS

A. Time period of long range forecasts
  1. For established firms
  2. For new firms
B. Time period of shortrun forecasts
  1. For established firms
  2. For new firms
  3. Need for more current data with respect to shortrun forecasts
C. Relationship between long-range and short-range forecasts
  1. The long-range forecast begins with short-range forecast
  2. Fixed items in short-range forecasts are variable in long-range forecasts

TOPIC IV. FORECASTING METHODS

A. Factor listing methods
B. Time series analysis and trend extrapolation
C. Statistical indicators
  1. Leading indicators
  2. Coincident indicators
  3. Lagging indicators
  4. Diffusion indexes
D. Opinion polling
  1. Sales force polling
  2. Executive opinions

3. Consumer intention surveys
4. Plant and equipment expenditure surveys

E. Sector analysis (Gross National Product analysis)
F. Econometrics (macro-models)
G. Correlation and regression analysis (micro-models)
H. Subjective modifications

TOPIC V. SOURCES OF INFORMATION ON BUSINESS CONDITIONS

A. U.S. Government
   1. Department of Commerce
   2. Department of Agriculture
   3. Bureau of Mines
   4. Tariff Commission
   5. Department of Labor
   6. U.S. Government Printing Office
B. Other sources
   1. Universities
   2. Banks
   3. Financial services
      a. Standard & Poor's
      b. Moody's
   4. Federal Reserve Board
   5. Miscellaneous private sources
      a. National Industrial Conference Board
      b. National Planning Association
   6. General business press

TOPIC VI. FORECASTED FINANCIAL STATEMENTS

A. Relationship of forecast to budgeting
B. Formal expression of plan in forecasted financial statements
   1. Financial forecast of sources and use of funds
   2. Forecasted income statement
   3. Forecasted balance sheet
   4. Forecast of capital budget

TOPIC VII. POSTFORECAST AUDIT AND FOLLOWUP

A. Use of forecast as control tool
B. Importance of postforecast audit
C. Techniques for postforecast audit and followup
   1. Compare actual postforecast audit versus forecasted outcomes
   2. Adjust forecast methods for greater accuracy in subsequent forecasts

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BASSIE, LOUIS. *Economic Forecasting*. New York: McGraw-Hill, 1958.

BUTLER, WILLIAM F. AND KAVESH, ROBERT A. *How Business Economists Forecast*. Englewood Cliffs, N.J.: Prentice-Hall, 1966.

COHEN, JEROME B. AND ROBBINS, SIDNEY M. *The Financial Manager*. New York: Harper and Row, 1966.

COLBERG, MARSHALL R.; FORBUSH, DASCOMB R.; AND WHITAKER, GILBERT R., JR. *Business Economics—Principles and Cases, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1964.

HECKERT, J. BROOKS AND WILLSON, JAMES D. *Business Budgeting and Control, 3rd ed.* New York: Ronald Press, 1967.

MCKINLEY, DAVID H.; LEE, MURRAY G.; AND DUFFY, HELENE. *Forecasting Business Conditions*. New York: American Bankers Association, 1965.

SILK, LEONARD S. *Forecasting Business Trends*. New York: McGraw-Hill, 1963.

SPENCER, MILTON H.; CLARK, COLIN G.; AND HOGUET, PETER W. *Business and Economic Forecasting: An Econometric Approach*. Homewood, Ill.: Richard D. Irwin, Inc., 1961.

BUSINESS INVESTMENTS (BI)

Functional Knowledge for: Trust Officer, Financial Institution Manager, Industrial Organization Manager, Treasurer, Loan Counselor

Hours Class: 1 hour daily — Total: 15 hours

Description and Teaching Suggestions

This unit is designed to give trainees an overview of corporate investments—background philosophy and rudimentary practices. Becoming acquainted with the theories of investments and the rationale for choosing one investment practice over another should provide trainees with basic knowledge for a fuller understanding of investment objectives.

Because of the nature of the topic, teachers should supplement classroom lecture with outside reading assignments in the area of business finance. Research assignments should be given, with trainees required to prepare and deliver classroom reports (either oral or written) on current investment practices of companies in the news. This approach will help to reinforce the theoretical material covered in lectures.

Guest speakers from the business community—treasurers, controllers, or senior management representatives—should be utilized to the fullest. Brokerage and investment firms are frequently prepared to provide trained speakers in this subject area. This should not be overlooked.

Standards of Achievement

1. Knowledge of investment analysis as basis for selection.
2. Understanding of investment terminology.
3. Knowledge of classification of corporate investment instruments.

Prerequisites for Study of Business Investments

Trainee selection standards.

Topic Outline

I. General Introduction to Corporate Investment Policy
II. Investment Characteristics and Classification of Securities
III. Basic Determinants of Investment Objectives
IV. Defensive or Aggressive Investment Policies
V. Investment Recording Techniques

TOPIC I. GENERAL INTRODUCTION TO CORPORATE INVESTMENT POLICY

A. The problem and mechanics of the investment program
   1. Need for an investment program—excess cash for long or short term interest or capital appreciation
   2. Theory of investment analysis for guidance toward selection
      a. Basic risks
      b. Liquid secondary reserves to offset risks
      c. Analytical services for factfinding and professional opinion

TOPIC II. INVESTMENT CHARACTERISTICS AND CLASSIFICATION OF SECURITIES

A. Bonds
   1. Bonds equal evidence of a debt
   2. Rated as to capacity of management's capability to create enough earnings to pay interest and principal of debt
B. Types of bonds
   1. Denominations
   2. Promise to pay
      a. Stated interest at stated periods
      b. Redemption of debt at maturity date
   3. Secured bonds—types of security underlying bond issue
   4. Unsecured bonds—debenture bonds equal to general creditors claim
   5. Specific type of secured bonds
      a. Mortgage bonds
      b. Collateral or equipment trust bonds or certificates
      c. Convertible bonds
      d. Sinking fund bonds
      e. Callable feature of bonds
C. Capital stock
   1. Common stock
      a. Certificate evidence of ownership
      b. No limitation on dividends
      c. Right to vote at stockholders meetings
      d. Pre-emptive rights
   2. Preferred stock
      a. Preference as to dividends and share of assets; either cumulative or noncumulative as to dividends
      b. Specific voting rights
      c. Callable and redemption feature to attract purchasers
      d. Convertible into common stock as added attraction to marketability
   3. Prudent man's attitude toward common and/or preferred stock for specific investment purposes
D. Classification of corporate investment instruments
   1. Corporate stocks and bonds
   2. Public utility stocks and bonds
   3. Railroad stocks and bonds
   4. State and municipal bonds
   5. U.S. Government securities

TOPIC III. BASIC DETERMINANTS OF INVESTMENT OBJECTIVES

A. Nature of investment
   1. Final selection of investment as to type
   2. Final decision as to need of investment purpose
   3. Safety features and quality
B. Risk factor of investment
   1. Fundamental calculations
   2. Leverage factor based on balance sheet analysis
   3. Price-earning ratio
   4. Time interest charges earned

C. Taxes governing investment policy
   1. Capital gains and losses
   2. Government securities for taxpaying purposes
      a. Interest earned—secondary factor
      b. Discounted price—prime factor in taxpaying security purchase
D. Ability of corporation making an investment to risk price depreciation
   1. Need for marketability
   2. Need for tax-exempt security

TOPIC IV. DEFENSIVE OR AGGRESSIVE INVESTMENT POLICIES

A. Adoption of corporate planning to investment requirements
   1. Mergers
   2. Takeovers
   3. Subsidiaries
B. Diversification of financial risk and the principles of diversifications
   1. Sound opportunities for expansion
   2. Conglomerate corporations
C. Methods of diversifying risk
   1. Dollar averaging for purchase of common stocks
   2. Use of underwriters and specialists in the field of finance

TOPIC V. INVESTMENT RECORDING TECHNIQUES

A. Investment control account in general ledger for balance sheet purpose
B. Subsidiary investment ledger
   1. Date purchased
   2. Numbers of shares or face amount of bonds
   3. Description of security
      a. Name of company
      b. Type of investment detailed
   4. Actual cost of purchase
      a. Price
      b. Commission
      c. Interest paid up bond
      d. Total cost
   5. Actual cost of sale
      a. Date of sale
      b. Price
      c. Commission and taxes
      d. Net proceeds of sale
   6. Gain or loss on sale of investment

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BADGER, RALPH E. AND COFFMAN, PAUL B. *The Complete Guide to Investment Analysis*. New York: McGraw-Hill, 1967.

BATES, GEORGE E. *Investment Management: A Casebook*. New York: McGraw-Hill, 1959.

BOGEN, JULES I. AND SHIPMAN, SAMUEL S. (eds.). *Financial Handbook*. New York: Ronald Press, 1966.

CLENDENIN, J. *Introduction to Investments, 4th ed.* New York: McGraw-Hill, 1964.

DOWRIE, GEORGE W. AND FULLER, DOUGLAS R. *Investments, 3rd ed.* New York: John Wiley and Sons, 1961.

HAYES, D. A. *Appraisal and Management of Securities*. New York: Macmillan, 1961.

PORTERFIELD, JAMES T. *Investment Decisions and Capital Costs*. Englewood Cliffs, N.J.: Prentice-Hall, 1965.

SAUVEIN, HARRY (ed.) *Investment Management*. Englewood Cliffs, N.J.: Prentice-Hall, published monthly.

CALCULATING COSTS AND PRICES (CCP)

Specialized Skill for: Contract Specialist, Purchasing Agent, Purchase-Price Analyst, Branch Manager, Contract and Order Administrator

Hours Class: 2 hours daily — Total: 20 hours

Description and Teaching Suggestions

Trainees will be introduced to the fundamentals of cost accounting systems and the manner in which costs and prices are determined. The nature of the manufacturing process should be discussed as background for an understanding of cost calculations.

It is suggested that the teacher approach this unit using actual business situation illustrations as much as possible. Sessions should emphasize practice, enabling the trainees to become involved with individual problem solving as well as class discussions.

The problems to be used should be prepared and duplicated, or ordered in advance, so that they may be distributed to trainees. It would help to assign problems to trainees in advance of class sessions. Texts may be assigned (in advance) from among those presented at the end of this unit.

Periodic quizzes are suggested to uncover areas of weakness.

Standards of Achievement

1. Demonstrate an understanding of the nature of the manufacturing process.
2. Know the various components of manufacturing costs.
3. Show a knowledge of various cost accounting systems.
4. Explain the flow of business documents and papers relative to costs.
5. Know the manner in which costs are calculated based upon the determination of production requirements.

Prerequisites for Study of Calculating Costs and Prices

Trainee selection standards.

Topic Outline

I. Introduction to Calculating Costs and Prices
II. Cost Accounting Records Which Support Costs
III. Job Order Cost Accounting
IV. Process Cost Accounting
V. Standard Cost Accounting
VI. Distribution Cost Accounting

TOPIC I. INTRODUCTION TO CALCULATING COSTS AND PRICES

A. The nature of manufacturing accounting
B. The elements of manufacturing costs
   1. Raw (direct) materials
   2. Direct labor
   3. Manufacturing expense (overhead)
C. Determination of the cost of goods manufactured
   1. Raw materials
   2. Work in process
   3. Finished goods
D. The need for calculation of costs and prices
   1. To control manufacturing efficiency
   2. To control expenditures (external and internal items)
E. The purpose of cost accounting
   1. Controlling and reducing costs
   2. Valuing inventories

TOPIC II. COST ACCOUNTING RECORDS WHICH SUPPORT COSTS

A. Purchase requisitions
   1. Authority for initiation
   2. Role of the purchasing agent
   3. Verification of vendors' prices
B. Receiving reports
   1. As a check on purchase requisitions
   2. Approval for payment by examination of documents
C. Vendors' invoices
   1. Matching invoices with other documents
   2. Approval for payment by examination of documents
D. Perpetual inventory records
   1. Types of perpetual inventory costing methods
      a. FIFO
      b. LIFO
      c. Average
   2. Recording cost data on various perpetual inventory records
      a. Raw materials
      b. Work in process
      c. Finished goods
E. Voucher system
   1. Use of voucher register as a purchase journal
   2. Internal control provided by voucher system
F. Payroll records
   1. Daily time reports
   2. Distribution of payroll
G. Expense analysis sheets
H. Materials requisitions
I. Bill of materials

TOPIC III. JOB ORDER COST ACCOUNTING

A. The nature of job order cost accounting
   1. Accountability by job rather than time period
   2. Types of industries using job order cost accounting
B. Job order cost sheet
   1. Use
   2. Illustration
C. Accounting for the acquisition of cost elements in a job order cost system
   1. Materials
   2. Labor
   3. Overhead
D. Flow of cost information in a job order cost system
   1. Purchase requisitions
   2. Materials requisitions
   3. Labor reports
   4. Expense analysis sheets
   5. Transfers to finished goods

TOPIC IV. PROCESS COST ACCOUNTING

A. The nature of process cost accounting
   1. Accountability by time period rather than job
   2. Types of industries using process cost accounting
B. Cost of production report
   1. Use
   2. Illustration
C. Accounting for the acquisition of cost elements in a process cost system
   1. Materials
   2. Labor
   3. Overhead
D. Flow of cost information in a process cost system
   1. Purchase requisitions
   2. Materials requisitions
   3. Labor reports
   4. Expense analysis sheets
   5. Transfers to finished goods

TOPIC V. STANDARD COST ACCOUNTING

A. Nature of standard cost accounting
   1. Predetermined rather than historical costs
   2. Industries to which standard cost systems apply
B. The value of standard cost accounting
   1. Simplifying costing procedures
   2. Setting selling prices
C. Setting standards
   1. Engineering studies
   2. Calculations of standard costs
      a. Material
      b. Labor
      c. Overhead
   3. Budgets for determination of prices
D. Standard cost card
   1. Use
   2. Illustration
E. Accounting for acquisition of cost elements in a standard cost system
   1. Materials
   2. Labor
   3. Overhead
F. Flow of cost information in a standard cost system
   1. Purchase requisitions
   2. Materials requisitions
   3. Labor reports
   4. Expense analysis sheets
   5. Transfers to finished goods
G. Analysis of variations from standard

TOPIC VI. DISTRIBUTION COST ACCOUNTING

A. Nature of distribution cost accounting
B. Distribution cost control
   1. Functional classification of expenses
   2. Distinction between direct and indirect expenses
   3. Distinction between fixed and variable expenses
   4. Allocation of functional costs
C. Distribution cost analysis
   1. By territory
   2. By customer
   3. By product
   4. By salesman

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BACKER, MORTON AND JACOBSEN, LYLE E. *Cost Accounting—A Managerial Approach.* New York: McGraw-Hill, 1964. Problems and Cases.

DEARDEN, JOHN. *Cost and Budget Analysis.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

GILLESPIE, CECIL. *Standard and Direct Costing.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

HORNGREN, CHARLES T. *Cost Accounting—A Managerial Emphasis.* Englewood Cliffs, N.J.: Prentice Hall, 1962. Problems and Cases.

MATZ, ADOLPH; CURRY, OTHEL J.; AND FRANK, GEORGE W. *Cost Accounting, 4th ed.* Cincinnati: South-Western, 1967. Exercises and Problems.

NEUNER, JOHN J. W. AND FRUMER, SAMUEL. *Cost Accounting—Principles and Practice, 7th ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1967.

NICKERSON, CLARENCE B. *Managerial Cost Accounting, 2nd ed.* New York: McGraw-Hill, 1962. Problems and Cases.

SHILLINGLOW, GORDON. *Cost Accounting—Analysis and Control, Revised Edition.* Homewood, Ill.: Richard D. Irwin, Inc., 1967. Exercises and Problems.

SPECTHRIE, SAMUEL W. *Basic Cost Accounting, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

TERRIL, WILLIAM A. AND PATRICK, A. W. *Cost Accounting for Management.* New York: Holt, Rinehart, and Winston, 1965. Problems.

WRIGHT, WILMER. *Direct Standard Costs.* New York: McGraw-Hill, 1962.

CORPORATE FINANCIAL PLANNING AND CONTROL (CFP)

Specialized Skill for: Chief Credit Analyst, Trust Officer, Financial Institution Manager, Budget Officer, Treasurer, Industrial Organization Manager, Loan Counselor

Hours Class: 2 hours daily — Total: 40 hours

Description and Teaching Suggestions

Trainees will be introduced to the concepts and techniques of sound corporate financial planning and control. Because the financial function is essentially the same in all businesses, the concepts discussed and the techniques reviewed will be general. Trainees should be introduced to the nature and role of the corporation in the American economy.

Since a great deal of the philosophy of corporate financial planning involves decisionmaking, the most effective approach can be to use group discussion and the case method.

The review of cases presenting actual business situations will enable the trainees to understand the fundamental concepts of planning, coordinating, controlling, and the other related areas of corporate financial management. Where possible, case reading assignments should be given in advance so that class time may be devoted to discussion and review. The teacher should advise trainees that for solutions of cases which involve decision making, there often is no one absolutely correct answer. Emphasis should be placed on the logical approach to answers, since financial managers differ in their approaches to problem solving.

Cases and other materials which are used by teachers may be duplicated or ordered in advance. As an alternative, texts which contain cases can be assigned to trainees, with the cases to be discussed being designated in advance.

Occasional quizzes are suggested to check acquisition of knowledge and uncover areas for review and reinforcement.

Standards of Achievement

1. Know the nature of corporations.
2. Know several techniques for managing current financial operations.
3. Know the techniques for meeting current financial requirements.
4. Know the techniques for meeting intermediate and longterm financial requirements.
5. Be able to evaluate financial alternatives.
6. Recognize and understand special financial problems, and demonstrate a knowledge of the techniques for their solution.

Prerequisites for Study of Corporate Financial Planning and Control

Trainee selection standards.

Topic Outline

I. General Introduction to Financial Planning and Control
II. Nature of Corporations
III. Management of Assets and Need for Funds
IV. Review and Analysis of Past Financing Patterns and Future Needs for Funds
V. Short Term Fund Sources
VI. Long Term Fund Sources
VII. Financing Growth and Development
VIII. Special Financial Considerations

TOPIC I. GENERAL INTRODUCTION TO FINANCIAL PLANNING AND CONTROL

A. The role of the financial planning and control function in business
B. Organization of the financial function
C. Review of organizational charts and the place of the chief financial officer within the company

TOPIC II. NATURE OF CORPORATIONS

A. The corporation as the dominant form of business in the American economy
B. The corporation as a legal entity
   1. Corporate name
   2. Term of life
   3. Corporate management
      a. Directors
      b. Stockholders
      c. Officers
C. Advantages and disadvantages of corporations
   1. Perpetual life
   2. Limited liability
   3. Ease of raising funds
   4. Tax status of corporations
   5. Ease in transferring ownership interests
D. Nature of corporate capital
   1. Capital stock
      a. Types of common stock
      b. Types of preferred stock
   2. Treasury stock

3. Bonds
4. Retained earnings
5. Additional paid-in capital
6. Capital surplus

TOPIC III. MANAGEMENT OF ASSETS AND NEED FOR FUNDS

A. Investment in and management of inventories
   1. Inventories as major assets of businesses
   2. Types of inventories
      a. Finished goods
      b. Work in process
      c. Raw materials
   3. Cash associated with investments in inventories
   4. Determination of risks of investments in inventory
   5. Ratios as aids in the analysis of investment in inventories
B. Management of investments in receivables
   1. Determination of credit policy and operations of the credit department
   2. Study of risks of investment in receivables
   3. Ratio analysis of investment in receivables
C. Management of cash position
   1. Effective use of cash
   2. Planning of cash requirements
   3. Cash flow forecasting
D. Investments in fixed assets
   1. Importance of investments in fixed assets
   2. Studies of need for fixed assets
   3. Cash flow considerations of investments in fixed assets

TOPIC IV. REVIEW AND ANALYSIS OF PAST FINANCING PATTERNS AND FUTURE NEEDS FOR FUNDS

A. Financial statement analysis
   1. Review of significant financial ratios of operations
   2. Review of significant financial ratios of financial condition
   3. Limitations of financial statement analysis
B. Source and uses of funds analysis
C. Forecasting future needs for funds
   1. Preparation of cash budgets
   2. Preparation of projected income statements
   3. Preparation of projected balance sheets

NOTE: Include a *brief* review of the major steps in the preparation of these reports.

TOPIC V. SHORT TERM FUND SOURCES

A. Trade credit
B. Use of bank credit
   1. Importance of bank credit
   2. Bank lending practices and standards
   3. Procedures for negotiating a bank loan
      a. Data required to support a loan application
      b. Proper execution of a loan application
   4. Bank measures for minimizing risk
   5. Costs of bank credit
   6. Maintaining good banking relationships
   7. Advantages and disadvantages of bank credit
C. Non-bank sources of short term funds
   1. Factoring and other means of borrowing against receivables
   2. Private lenders
   3. Government sources
D. Use of security in securing short term funds
   1. Receivables
   2. Inventory
   3. Plant (fixed) assets
   4. Guaranty of loans
   5. Subordination of credit claims

TOPIC VI. LONG TERM FUND SOURCES

A. Internal generation of long term funds through earnings
   1. The effect of dividend policy on retained earnings
   2. Considerations in determination of dividend policy
B. External sources of long term funds
   1. The issuance of new securities
   2. The public as a market for the sale of securities
   3. The institutional market for the sale of securities
      a. Commercial banks
      b. Savings and loan associations
      c. Nonprofit organizations
   4. Other sources of long term funds
C. Basic types of long term securities
   1. Preferred stock
   2. Common stock
   3. Bonds
D. Factors affecting decision as to types of securities to issue
   1. The distribution of risk
   2. The cost of funds
   3. The allocation of income
   4. The loss of control

TOPIC VII. FINANCING GROWTH AND DEVELOPMENT

A. Problems confronting the new enterprise
   1. Scarcity of available funds
   2. Newness as a financial problem
   3. The need to conserve funds
B. Sources of funds for the new, small enterprise
   1. Government assistance
   2. Other avenues available
C. Approaches to financing business mergers and acquisitions

TOPIC VIII. SPECIAL FINANCIAL CONSIDERATIONS

A. Employee pension plans and other areas of additional compensation
B. Evaluation of insurance programs
   1. Types of coverage desired
   2. Cost of insurance
C. Tax aspects of financial decisions
D. Leasing versus buying
   1. Advantages
   2. Disadvantages
E. The effects of government regulation

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit.

ARCHER, STEPHEN H. AND D'AMBROSIO, CHARLES. *Business Finance: Theory and Management*, New York: Macmillan, 1966.

BERANEK, WILLIAM. *Analysis for Financial Decisions*. Homewood, Ill.: Richard D. Irwin, Inc., 1963.

BOGEN, JULES I. AND SHIPMAN, SAMUEL S. (eds.). *Financial Handbook, 4th ed.* New York: Ronald Press, 1964.

BRADLEY, JOSEPH F. *Administrative Financial Management*. New York: Holt, Rhinehart, and Winston, 1964.

BRANDT, LOUIS K. *Business Finance: A Management Approach*. Englewood Cliffs, N.J.: Prentice-Hall, 1965.

COHEN, JEROME B. AND ROBBINS, SIDNEY M. *The Financial Manager*. New York: Harper and Row, 1966.

DAUTEN, CARL A. AND WELSHANS, MERLE T. *Principles of Finance: Introduction to Capital Markets, 2nd ed.* Cincinnati: South-Western, 1964.

DONALDSON, ELVIN F. AND PFAHL, JOHN K. *Corporate Finance: Policy and Management, 2nd ed.* New York: Ronald Press, 1963.

GUTHMANN, HARRY G. AND DOUGALL, HERBERT E. *Corporate Financial Policy, 4th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

JOHNSON, ROBERT W. *Financial Management, 3rd ed.* Boston: Allyn and Bacon, College Division, 1966.

LINDSAY, ROBERT AND SAMETZ, ARNOLD W. *Financial Management: An Analytical Approach*. Homewood, Ill.: Richard D. Irwin, Inc., 1963.

WESTON, J. FRED AND BRIGHAM, EUGENE S. *Managerial Finance, 2nd ed.* New York: Holt, Rhinehart, and Winston, 1966.

Case Books:

FENLON, PAUL E. *Financial Management Decisions: Case Problems*. Boston: Allyn and Bacon, 1964.

HOWARD, BION B. AND JONES, SIDNEY L. *Managerial Problems in Finance*. New York: McGraw-Hill, 1964.

MASSON, ROBERT L.; HUNT, PEARSON; AND ANTHONY, ROBERT N. *Cases in Financial Management*. Homewood, Ill.: Richard D. Irwin, Inc., 1960.

NEMMERS, ERWIN E. *Cases in Finance*. Boston: Allyn and Bacon, 1964.

NORGAARD, RICHARD L. AND LONGSTREET, JAMES R. *Cases in Financial Management, 2nd ed.* Belmont, Calif.: Wadsworth, 1964.

VANDELL, ROBERT F. AND COLEMAN, ALAN B. *Case Problems in Finance, 4th ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1962.

CORPORATE INSURANCE PRACTICE (CIP)

Environmental Knowledge for: Financial Institution Manager, Treasurer, Industrial Organization Manager, Insurance Office Manager

Hours Class: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

This unit is designed to acquaint trainees with the overall activity of administering corporate insurance plans and programs. Without going into depth in any one area, the trainee will become familiar with all facets, the terminology employed, and the importance of careful evaluation of industrial insurance needs.

It is suggested that most of the material be presented in lecture form, with periodic written or oral quizzes given to evaluate the trainee's understanding and grasp of the subject matter. Guest lecturers, preferably industrial insurance managers or brokers, may be used profitably to supplement the material covered in this unit.

Standards of Achievement

1. Know various types of corporate insurance coverage.
2. Know how carriers, underwriters, and agents can assist in securing proper coverage.

Prerequisites for Study of Corporate Insurance Practice

Trainee selection standards.

Topic Outline

I. General Introduction
II. Considerations and Economics
III. Types of Insurance Carriers
IV. Underwriter Associations
V. Value of Corporate Insurance
VI. Legal Interpretations
VII. Broad Coverage Analyses
VIII. Corporate Insurance Records

TOPIC I. GENERAL INTRODUCTION

A. Purpose of basic necessary insurance
   1. Risk of corporation and corporate property
   2. Guarding against unforeseen calamities
   3. Principle of insurance is risk distribution
   4. Definition of insurance carrier
B. Bases for determining the amount of property loss
   1. Reimbursement to the policyholder for a loss
   2. Modification of rates for certain risks
   3. Rate reduction by eliminating undesirable risks
   4. All-risk policies
C. Co-insurance—definition, meaning, and examples

TOPIC II. CONSIDERATIONS AND ECONOMICS

A. Possible losses due to forces beyond control—negligence, accidents, lawsuits, etc.
B. Deductible clauses
C. Subrogation
D. State and Federal supervision
E. Assignment clauses
F. Bankruptcy clauses
G. Compulsory types of insurance
H. Element of gambling—insurable interests
I. Return of premiums (cancellation and short term)
J. Over insurance and under insurance

TOPIC III. TYPES OF INSURANCE CARRIERS

A. Stock companies
B. Mutual organizations
C. Local fire mutuals
D. Factory fire mutuals
E. Casualty insurance mutuals
F. Life insurance mutuals
G. Reciprocal organizations
H. Lloyd's of London type
I. Self-insurers
J. Federal and State Government insurance programs

TOPIC IV. UNDERWRITER ASSOCIATIONS

A. Definition of underwriter
B. Need for associations
C. State legislation regarding rate making organizations
D. Types of underwriter associations
   1. National
   2. Local
   3. Important national underwriters organizations
      a. National Board of Fire Underwriters
      b. National Bureau of Casualty Underwriters
      c. National Council on Compensation Insurance
      d. National Automobile Underwriters Association
E. Functions
   1. Ratemaking and lobbying
   2. Economical operation
   3. Standard policies and procedures
   4. Enforcement of rules
   5. Public relations for the insurance industry
   6. Educational activities

TOPIC V. VALUE OF CORPORATE INSURANCE

A. Two methods of insuring against risks
   1. Self-insurance
   2. Regular insurance
B. Certainty substituted for uncertainty
C. Elimination of worry
D. Factor in granting of credit
E. For supplemental old-age pensions

TOPIC VI. LEGAL INTERPRETATIONS

A. Conditional contract—definition
B. Executory contract—definition
C. Insurable interest
   1. Ownership of property—in fee
   2. Mortgage interest in property
   3. Bailee, commission, or warehouse interest in connection with property and corporate activity
   4. Interest arising from occupancy of property by corporation or assignees
   5. Law-imposed liability (public carriers, etc.)
   6. Business interruption insurance
D. Validity of insurance contract
   1. Agreement of parties
   2. Competency
   3. Valuable consideration (premium)
   4. Legality of purpose

5. Policy must conform with all the provisions required by the law of the State wherein it is issued

D. Third party interest in corporate policies

TOPIC VII. BROAD COVERAGE ANALYSES

A. Fire insurance
   1. The standard corporate policy
      a. Description of property covered
      b. Period of coverage
      c. Risk assumed by insurance carrier
      d. Procedure in connection with adjustment of losses
         (1) Examinations
         (2) Appraisal
      e. Basis of valuation of losses
   2. Special types of policies
      a. Scheduled
      b. Blanket
      c. Floater
      d. Automatic coverage
   3. Specific endorsements and forms
   4. Mortgagee clauses
   5. Extended coverage
   6. Supplemental contract (Covering losses due to windstorm, explosion, riot, riot attending a labor dispute or strike, smoke. vandalism, vehicles, etc.)
   7. Cancellation of fire policy—Short rate premium

B. Sprinkler leakage and water damage insurance
   1. Need for water damage insurance
   2. Specific carrier exclusions from water damage policy

C. Explosion insurance

D. Steam boiler and machinery insurance
   1. Special endorsements
      a. Automatic coverage of new machinery
      b. Premiums over $3,000
      c. Blanket grouping for certain selected classifications of boilers and machinery
      d. Seasonal boilers and machinery
   2. Use and occupancy insurance
   3. Consequential damage insurance
      a. Loss due to spoilage of insured's property
      b. Liability for spoilage of property of others

E. Plate glass insurance

F. Burglary, theft, larceny, dishonesty, and robbery insurance
   1. Definitions of related terms
   2. Mercantile open stock burglary or theft insurance
   3. Bank burglary and robbery insurance
   4. Messenger robbery or theft insurance
   5. All-risk policy

G. Fidelity and surety bonds
   1. Types of fidelity bonds
   2. Surety bonds and their application to commercial liability

H. Marine insurance
   1. Loss of hull
   2. Loss of cargo
   3. Loss of freight charges
      a. Open policies
      b. Blanket policies
   4. Endorsements available
   5. War risk and civil commotion
   6. Pilferage

I. Inland marine insurance
   1. Protection of property in course of transportation—not on high seas
   2. Types of inland marine policies
      a. Transportation floater
      b. Personal property floater
      c. Property and equipment of commercial enterprises
      d. Definition of floater

J. Inland transit policy

K. Floaters covering property and equipment

L. Construction risks

M. Corporate liability policies
   1. Manufacturers and contractors
   2. Product
   3. Public
   4. Elevator
   5. Comprehensive
   6. Comprehensive, personal
   7. Professional

N. Automobile and truck insurance
   1. Personal
   2. Fleet

O. Employee coverage insurance

P. Workmen's compensation

Q. Disability benefits

R. Other protection policies
   1. Rain
   2. Hail
   3. Windstorm
   4. Livestock
   5. Title
   6. Credit
   7. Professional

TOPIC VIII. CORPORATE INSURANCE RECORDS

A. Insurance ledger
   1. Insurance carrier
   2. Policy number
   3. Type or kind of coverage and endorsements
   4. Amount of insurance
   5. Insurable interest (optional)
   6. Amount of premium for firm
   7. Name of broker (or agent) responsible for policy
   8. Remarks (or note of change) column

Texts and Other Teaching Materials

From the following suggested texts and materials (or commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

American Management Association. *The Growing Job of Risk Management.* New York: American Management Association, 1962.

———. *The Growth of Corporate Insurance Management.* New York: American Management Association, 1964.

———. *Identifying and Controlling the Risks of Accidental Loss* New York: American Management Association, 1962.

ATHEARN, JAMES L. *Risk and Insurance.* New York: Appleton-Century-Crofts, 1962.

DENENBERG, HERBERT S.; EILERS, ROBERT D.; HOFFMAN, G. WRIGHT; KLINE, CHESTER A.; MELONE, JOSEPH J.; AND SNIDER, H. WAYNE. *Risk and Insurance.* New York: McGraw-Hill, 1964.

ELLIOTT, CURTIS M. *Property and Casualty Insurance.* New York: McGraw-Hill, 1960.

FACTORY MUTUAL SYSTEM. *Handbook of Industrial Loss Prevention, 2nd ed.* New York: McGraw-Hill, In Press.

GALLAGHER, RUSSELL B. *Auditing the Corporate Insurance Function.* New York: American Management Association, 1964.

HOWARD, WILLIAM M. *Cases on Risk Management.* New York: McGraw-Hill, 1966.

MOWBRAY, ALBERT H. AND BLANCHARD, RALPH H. *Insurance, 5th ed.* New York: McGraw-Hill, 1961.

NATIONAL INDUSTRIAL CONFERENCE BOARD, INC. *Business Interruption.* New York: National Industrial Conference Board, Inc., 1966.

———. *Organization of Insurance Administration.* New York: National Industrial Conference Board, Inc., 1966.

WHITE, EDWIN H. *Business Insurance, 3rd ed.* New York: McGraw-Hill, 1963.

WILLIAMS, C. ARTHUR, JR. *Risk Management and Insurance.* New York: McGraw-Hill, 1964.

FORMS DESIGN (FD)

Functional Requirement: Chief Clerk, Clerical Technician, File Service Worker, Office Manager, Procurement Services Supervisor, Direct-Mail Specialist, Contract and Order Administrator

Hours Class: 1 hour daily — Total: 20 hours

Description and Teaching Suggestions

This short unit is designed to teach trainees to analyze and design forms, and to inform the trainees about the importance of this work in government and business. Forms design is usually one aspect of a companywide forms control program which may be performed by a central staff specialist. When control is not centralized, various employees throughout the firm will probably design forms. Supervisors and administrators may be called upon by top management to design a form to obtain special information. Emphases in this unit should be placed on practice in design of simple forms related to the work needs of the trainee or answering needs in class problems, and in developing an understanding of the need for professional assistance in forms design. The content should be oriented to the "doing" aspect rather than merely acquiring the knowledge. This unit can be coordinated with procedures writing for experienced trainees who desire to upgrade skills. Trainee evaluation can be made by tests on factual information and by teacher observation.

Standards of Achievement

1. Design simple useful forms for use in the office for recording a variety of information needed by the employer.
2. Demonstrate fundamental skills in good form design.

Prerequisites for Study of Forms Design

Trainee selection standards.

Topic Outline

I. Introduction to Forms Design
II. The Standard Aspects of a Form
III. The Working Area on a Form
IV. Forms Construction
V. Forms Production

VI. Forms Analysis
VII. Forms Management Program

TOPIC I. INTRODUCTION TO FORMS DESIGN

A. Definition of forms
B. Importance of forms
   1. Nature of business forms
   2. When to use forms
C. Necessity for careful forms design
D. Groundwork before designing a form
   1. Knowledge of purpose
   2. Organized list of items of information needed (constant and variable)
   3. Flow diagram
   4. Forms distribution chart
   5. Machines and types of files or binders used
E. Samples of various types of forms
   1. Snap out and one-time carbon
   2. Punched card
   3. Odd-size
   4. Regular, such as checks, application blanks, and letterheads
   5. Continuous
F. Classification of forms by function

TOPIC II. THE STANDARD ASPECTS OF A FORM

A. Identification
   1. Title and subtitle
   2. Form number
B. Control
   1. Edition date
   2. Control symbols
   3. Instructions for filling and dispatching
   4. Identification for routing each copy
C. Size, margins, and fill-in method
D. Mailing
   1. Window envelope alignment
   2. Self-mailers
E. Filing problems related to size and material

TOPIC III. THE WORKING AREA ON A FORM

A. Continuity of the parts
   1. Identification: who, where, when, why
   2. Specifications: what, how much
   3. Authorization: who authorized
B. Data flow
   1. Left to right
   2. Top to bottom
   3. Straight line concept
C. Layout
   1. Homogenous groupings
   2. Sequence of items with source document
   3. Sequence to correspond to subsequent records
   4. Location of items for reference
   5. Checkoff items

TOPIC IV. FORMS CONSTRUCTION

A. Rough draft
   1. Form design guide sheets
   2. Grouping and sequencing items
   3. Computing space requirements
B. Construction
   1. Number of copies
   2. Type of carbon
   3. Size
   4. Lines
   5. Boxes
   6. Space requirements
C. Construction of various forms
   1. Loose forms with interleaved (or nonsmear) carbons
   2. Padded forms
   3. Continuous fanfold forms
D. Single-part or multiple-part forms
   1. Perforations or scorings
   2. Special block-outs

TOPIC V. FORMS PRODUCTION

A. Printing specifications
   1. Paper (weight, color, size, grade)
   2. Ink
   3. Number of printed sides
   4. Rounded or square corners
   5. Type size and style
   6. Carbon copies and their registration
   7. Binding
   8. Punching
   9. Sequential or serial numbering
   10. Folding
   11. Quantity
B. Printing or duplicating process
C. Proofs
D. Delivery
   1. Schedule
   2. Shipping instructions
E. Stocking, distribution, and replenishment

TOPIC VI. FORMS ANALYSIS

A. What analysis involves
   1. Purpose and use of the form
   2. Classifications
   3. Information gathering

4. Collection of filled forms
5. Thoughtful observation

B. Results or goals of forms analysis
1. Simplification
2. Elimination of duplication and waste
3. Control
4. Cost reduction
5. Increased efficiency
6. Better forms design
7. Improved integration of departmental forms

TOPIC VII. FORMS MANAGEMENT PROGRAM

A. Goals of a forms management program
B. Centralized forms file and its use
C. Forms personnel
1. Forms design personnel
2. Program director, negotiator, and consultant
D. Operating a forms management program

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

CADMUS, WESLEY S. *A Forms Manual.* Hartford, Conn.: Wesley S. Cadmus, 1962.

DEPARTMENT OF THE NAVY, NAVY MANAGEMENT OFFICE. *Guide to Forms Management.* (NMO Inst. 5213.5A) Washington: Department of the Navy, Navy Management Office, 1963.

MARION, ROY. *Marion on Forms Control.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

MYERS, GIBBS. *Forms Design and Control, Systems and Procedures.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

NATIONAL ARCHIVES AND RECORDS SERVICE. *Forms Analysis.* Washington: General Services Administration, 1960.

———. *Forms Design.* Washington: General Services Administration, 1960.

PLACE, IRENE AND HICKS, CHARLES. *Office Management, 2nd ed.* Boston: Allyn and Bacon, 1962.

SADEUSKES, WALLAS B. *Manual of Business Forms.* New York: Office Publications, Inc. 1961.

INTRODUCTION TO BIDS AND CONTRACTS (IBC)

Specialized Knowledge for: Purchase-Price Analyst, Administrative Assistant, Branch Manager, Contract Specialist, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Contract and Order Administrator

Hours Class: 1 hour daily — Total: 15 hours

Description and Teaching Suggestions

This unit is designed for those trainees who will be concerned with the administration and conduct of activities in connection with bids and contracts at the operational and control levels of management.

The objective of the unit is to provide an overview of the topic, sufficient in depth to acquaint trainees with the basic steps and procedures essential to the effective processing of bids and subsequent administration of contracts let upon bid acceptance. To supplement lecture material, it is suggested that the teacher obtain from industrial resource facilities in the area of purchasing and contracting, policy and procedure statements, together with appropriate blank forms. These should serve to familiarize the trainees with the language used and the detail which is required to determine bid acceptance and contract formulation.

Further, it is suggested that guest speakers, such as contract officers and purchasing agents from local industry, be asked to amplify the material presented by the teacher.

Standards of Achievement

1. Demonstrate understanding of what constitutes a bid and a contract.
2. Explain the interrelationship and interdependence of the commercial, engineering, legal, and purchasing functions in the preparation of bids and contracts.
3. Describe the procedure to be followed in analyzing a bid.

Prerequisites for Study of Introduction to Bids and Contracts

Trainee selection standards.

Topic Outline

I. Nature of Bids
II. Preparation of Bids
III. Securing Quotations
IV. Bids Analysis
V. Determination of Best Source
VI. Fundamentals of Contracts
VII. Contract Preparation

TOPIC I. NATURE OF BIDS

A. Definition of bid
B. Buying versus selling
C. Bidders' lists
   1. Private purchasing
   2. Public purchasing
   3. Vendor index
D. Classification of bids
   1. Manufacturing
   2. Construction
   3. Research and development
   4. Service

TOPIC II. PREPARATION OF BIDS

A. Variations by classification
   1. Manufacturing
   2. Construction
   3. Research and development
   4. Service
B. Organizational components involved
   1. Commercial department
      a. Bank contact
      b. Determination of finance or credit sources
   2. Engineering department
      a. Establishment of requirements
      b. Material specifications
   3. Legal department (house counsel)
      a. Determination of applicable legislation
      b. Review of terms
   4. Purchasing department
      a. Clerical functions
      b. Negotiations as required

TOPIC III. SECURING QUOTATIONS

A. Sources of supply (available vendors)
   1. Broadest possible price information
   2. Desirability of geographical spread
B. Bid invitations to include:
   1. Quantity
   2. Specifications
   3. Location of delivery
   4. Date or dates required
   5. Method (air, rail, truck) of delivery
   6. Closing date for submission of bid
   7. Special conditions (if any)
   8. "Boiler plate" or legal safeguards
C. Competitive bidding
D. Acknowledgment

TOPIC IV. BIDS ANALYSIS

A. Significant price variations
   1. Examination of all factors
   2. Interview highest and lowest bidders
B. Quality and service investigation
C. Comparison of factors on competitive bids
   1. Cost
   2. Design and/or specifications
   3. Legal
   4. Delivery

TOPIC V. DETERMINATION OF BEST SOURCE

A. Type of purchase
   1. Original purchase—nonrepetitive item or service
   2. Original purchase—repetitive
   3. Subsequent purchase—repetitive
B. Factors to be considered
   1. Geographic location
   2. Shipping costs
   3. Supplier service after purchase
   4. Financial capability of supplier
   5. Tenor of labor-management relations of supplier
   6. Product quality
   7. Price stability subsequent to placement of order
   8. Supplier's ability to supply anticipated volume
   9. Past performance

TOPIC VI. FUNDAMENTALS OF CONTRACTS

A. Definition of contract
B. Oral commitments
C. Types of contracts
   1. One time
   2. Short period
   3. Long term
   4. Blanket
   5. Fixed price
   6. Penalty
   7. Construction
   8. Implied
D. Breach of contract
   1. Retraction of offer or bid
   2. Failure to meet provisions
E. Cancellation
F. Termination

TOPIC VII. CONTRACT PREPARATION

A. Requirements for legally enforceable contract
B. Utilization of legal counsel

C. Collection and inclusion of all pertinent data
D. Mistakes in contracts
   1. Of law
   2. Of fact
   3. Of specification
E. Special considerations of construction contracts
   1. Fixed-price or lump sum
   2. Cost-plus-fee
   3. Subcontracting of specialized areas
   4. Responsibility for subcontractors
   5. Force majeure clauses
   6. Licenses, permits, and bonds
   7. Reconstruction of damage or destruction
   8. Construction equipment control
   9. Guaranteed price with or without sharing in savings

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ALJIAN, GEORGE W. (ed.). *Purchasing Handbook, 2nd ed.* New York: McGraw-Hill, 1966.

DEROSE, L. J. *Negotiated Purchasing.* Boston: Materials Management Institute, 1962.

LASSER, J. K. *Business Management Handbook, 2nd ed.* New York: McGraw-Hill, 1960.

LEE, LAMAR AND DOBLER, DONALD W. *Purchasing and Materials Management.* New York: McGraw-Hill, 1965, Text and Cases.

MCDONALD, PAUL R. *Government Prime Contracts and Subcontracts.* Glendora, Calif.: Procurement Associates, 1964.

TERRY, G. R. *Principles of Management.* Homewood, Ill.: Richard D. Irwin, Inc., 1964.

INVENTORY CONTROL PRACTICES (ICP)

Basic Skill for: Branch Manager, General Foreman, Procurement Services Supervisor, Chief Clerk

Hours Class: 2 hours daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed primarily to develop clerical inventory control skills. It presents several inventory control concepts and relates them to organizational needs.

Some of the concepts to be presented are the FIFO and LIFO methods, perpetual inventory control, and physical inventory check and control methods. Teachers should allow trainees practice in the methods by designing related practice problems. Since the emphasis in this unit is on skill development, teachers should obtain supplies of typical inventory control cards for use by the trainees. A trip to a large local manufacturing or warehousing firm should be planned for the trainees so that they may see actual inventory control methods, including automated practice.

Standards of Achievement

1. Operate perpetual inventory control system.
2. Know details of LIFO and FIFO methods of control.
3. Know how to take physical inventories.
4. Know how to adjust records and issue proper notifications of inventory.
5. Know relationship and importance of inventory control to other organizational departments.

Prerequisites for Study of Inventory Control Practices

Trainee selection standards.

Topic Outline

I. Need for Inventory Control
II. Inventory Control Relationships
III. Concepts in Inventory Control
IV. Clerical Inventory Control Practices
V. Automation of Inventory Control
VI. Physical Inventory Control
VII. Setting Up Inventory Control Systems

TOPIC I. NEED FOR INVENTORY CONTROL

A. Cost control
   1. Prevention of overbuying
   2. Prevention of capital tie-up
   3. Prevention or minimization of obsolescence
   4. Timeliness of purchases
   5. Avoidance of downtime of production operations
   6. Assistance to accountants in determining certain values
B. Production control
   1. Availability of materials
   2. Notification to production of imminent shortages
   3. Seasonal demands for certain products or supplies
C. Other uses
   1. Spotting pilferage
   2. Identifying out-of-line storage condition
   3. Supplying customer needs
   4. Assisting production in emergency situations

TOPIC II. INVENTORY CONTROL RELATIONSHIPS

A. Purchasing department
B. Materials control department
C. Shipping and receiving
D. Production department
E. Sales department
F. Accounting department
G. Other departments—maintenance, production control, engineering

TOPIC III. CONCEPTS IN INVENTORY CONTROL

A. First-In, First-Out Method (FIFO)
B. Last-In, First-Out Method (LIFO)
C. Reserves
D. Physical inventory check and control
E. Obsolescence and creeping obsolescence
F. Reordering concepts—maximums and minimums, order control points
G. Retail and bulk item control
H. Receipt checking
I. Authorization for insurance
J. Bin tags and stock location systems
K. Deterioration control
L. Raw, in-process, and finished goods control
M. Supplies control
N. Perpetual inventory methods
O. Ideal inventories

TOPIC IV. CLERICAL INVENTORY CONTROL PRACTICES

A. Notification to purchasing department
   1. Requisitions for reordering (forms)
   2. Usage rate notification (memo or call)
   3. Notification of obsolescence (memo, call, or forms)
   4. Notification of deterioration (memo, call, or forms)
   5. Notification of receipt and check of materials (forms)
   6. Notification of back-ordered materials and supplies
B. Receipt of materials and supplies
   1. Check of quantity received against purchase order
      a. Physical count or identification
      b. Lot checking by count and weight
      c. Back-order checking
   2. Checking for damaged, short, or lost item
   3. Receipt of in-process or finished goods
      a. Notification to accounting department
      b. Notification to sales department
   4. Notification to production department of materials or supplies availability
      a. Raw materials
      b. Purchased assemblies
      c. In-process assemblies or materials
   5. Identification against LIFO or FIFO methods of control
   6. Stores notification
   7. Bin-tag notation
   8. Inventory control record notation
      a. Tub cards
      b. Visible records
      c. Punch cards or tapes
C. Issuance—control
   1. Authorized requisitions with proper notations
   2. Orders of sale
   3. Bin-tag notation from sales orders of requisitions
   4. Inventory control card notation from series orders or requisitions
   5. Counting, weighing, and other identification methods
   6. Stock locations
   7. Issuance in accord with LIFO, FIFO, or other methods
D. Checking control cards
   1. Maximums
   2. Minimums
   3. Seasonal variations of quantity
   4. Reserves to be held
   5. Movement of materials (rate)
   6. Sundry details
      a. Dates of receipt
      b. Dates of issuance
      c. Quantities
      d. Part or assembly number identification
      e. Weight or volume control record of certain supplies

TOPIC V. AUTOMATION OF INVENTORY CONTROL

A. Punch card systems
B. Punched tapes
C. Computerized controls

TOPIC VI. PHYSICAL INVENTORY CONTROL

A. Check on records
B. Periodic and aperiodic physical checks on inventory
C. Methods of counting, weighing, and measuring materials and supplies
D. Recording and comparing physical counts against clerical records

E. Adjusting records
F. Notification to responsible management
   1. Purchasing
   2. Production
   3. Accounting
   4. Sales

TOPIC VII. SETTING UP INVENTORY CONTROL SYSTEMS

A. Nature of products and supplies
B. Identification of materials
   1. Alphabetic
   2. Numeric
C. Stock location
D. Initial entries
E. Methods of processing
F. Equipment available
   1. Visible card files
   2. Rotating files or drums
   3. Power files
   4. Tubs
   5. Punch card systems
   6. Computers

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit.

BROWN, ROBERT G. *Statistical Forecasting for Inventory Control.* New York: McGraw-Hill, 1959.

CARROLL, PHIL. *Practical Production and Inventory Control.* New York: McGraw-Hill, 1966.

ENTELEK, INC. *Programmed Instruction in Inventory Management.* New York: McGraw-Hill, 1964.

HADLEY, G. AND WHITIN, T. M. *Analysis of Inventory Systems.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

KOENIGSBERG, ERNEST AND BUCHAN, JOSEPH F. *Scientific Inventory Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

MAGEE, JOHN F. AND BOODMAN, DAVID M. *Production Planning and Inventory Control, 2nd ed.* New York: McGraw-Hill, 1967.

MAYER, RAYMOND R. *Production Management.* New York: McGraw-Hill, 1962.

MOORE, HARRY D. AND KIBBEY DONALD B. *Manufacturing Materials and Processes.* Homewood, Ill.: Richard D. Irwin, Inc., 1965.

NADDOV, E. *Inventory Systems.* New York: John Wiley and Sons, In Press.

PRICHARD, JAMES W. AND EAGLE, ROBERT H. *Modern Inventory Management.* New York: John Wiley and Sons, 1965.

STARR, MARTIN K. AND MILLER, DAVID W. *Inventory Control.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

JOB DESCRIPTIONS, SPECIFICATIONS, AND EVALUATION (JD)

Functional Knowledge for: Chief Clerk, Clerical Technician, Junior Executive, Office Manager, Process-Description Writer, Trainee Manager, Vocational Disability Examiner, General Foreman, Operations Officer, Budget Officer, Administrative Assistant, Branch Manager

Hours Class: 1 hour daily; Practice: 1 hour daily — Total: 60 hours

Description and Teaching Suggestions

The trainees will be given a general introduction to the techniques of preparing job descriptions and evaluations. The contribution of job descriptions and evaluations to the operation of an enterprise, and how the two procedures contribute to satisfactory employee-employer relations will be covered. How the techniques help to solve compensation problems and pay rate inequities, as well as the methods used to control labor costs will be emphasized. How these techniques help avoid problems of favoritism or the appearance of favoritism and how they help to maintain worker morale at a high level should be pointed out. A number of class discussions should be led by the teacher, but they should be structured to develop the knowledge and techniques of the trainees based on their present and/or prior knowledge of business.

It is recommended that the teacher use case examples so that trainees may work on individual projects. In this way, their skills in writing job descriptions and completing job evaluations will be developed. In addition, the teacher is advised to make use of subcommittees or a series of workgroups so that the trainees may be provided with the experience of preparing and analyzing job descriptions and job evaluations in a group environment. If some trainees have had no previous work experience in the field, they should be assigned supplemental reading.

It is highly desirable that the teacher have actual examples of written job descriptions and work sheets utilized in the job evaluation process available for the classroom and workshop practice. If such material is not readily available, the instructor should prepare case examples of both of the aforementioned items before discussing such specific techniques in the classroom.

Standards of Achievement

1. Select elements to measure value of jobs.
2. Collect information necessary for a job description.
3. Organize job data to include all factors for several job evaluation plans.
4. Prepare job descriptions satisfactorily.
5. Apply job evaluation elements to various types of jobs.
6. Demonstrate knowledge of how to install a job evaluation plan.

Prerequisites for Study of Job Descriptions, Specifications, and Evaluation

Trainee selection standards.

Topic Outline

I. Concepts of Job Evaluation
II. Factors in Job Evaluation
III. Preparing for a Job Evaluation Program
IV. Application of Job Evaluation Plans
V. Developing a Quantitative Plan
VI. Methods of Evaluating Jobs
VII. Job Analysis
VIII. Job Descriptions
IX. Job Specifications
X. Job Evaluation Techniques
XI. Installing a Job Evaluation Plan

TOPIC I. CONCEPTS OF JOB EVALUATION

A. Definition of job evaluation
B. Historical background of job evaluation
C. Opposition to job evaluation
   1. From management and entrepreneurs
   2. From labor organizations
D. Basic concepts of job evaluation
E. Relationship to job descriptions and wage and salary administration

TOPIC II. FACTORS IN JOB EVALUATION

A. Job analysis
B. Job descriptions and specifications
C. Selection of elements for compensation
D. Building a job evaluation system
E. Rating of jobs
F. Costing the job structure

TOPIC III. PREPARING FOR A JOB EVALUATION PROGRAM

A. Requirements and concepts of a job evaluation program
B. Obligations of management to establish and maintain the program
C. Participation by labor organizations
D. Determining and assigning responsibilities
E. Scheduling assignment deadlines
F. Communication of program to all employees
G. Training of supervision

TOPIC IV. APPLICATION OF JOB EVALUATION PLANS

A. Manual jobs
B. Clerical jobs
C. Supervisory, administrative, and managerial positions
D. Executive positions

TOPIC V. DEVELOPING A QUANTITATIVE PLAN

A. Selection of elements
B. Definition of elements
C. Different values of various elements
D. Use of a standard system
E. Practice in writing definitions and evaluating elements

TOPIC VI. METHODS OF EVALUATING JOBS

A. Utilization of job descriptions
B. Outside consultant or specialist evaluation
C. Use of a committee within the organization
D. Member of personnel department
E. Task force directed by a line executive

TOPIC VII. JOB ANALYSIS

A. Definition and purpose of job analysis
B. Participants in job analysis
C. Techniques used in job analysis
   1. Determining job content
      a. Interviewing principles and methods
      b. Written questionnaire
      c. Informal survey
      d. Oral and written descriptions by employees and supervisors of jobs performed
      e. Use of trained observers for short cycle jobs
      f. Combination of methods (a) through (e)
   2. Communications to employees and supervisors regarding collection of data
   3. Preliminary review of job titles
      a. By departments in organization
      b. Standardizing job titles
      c. Use of Dictionary of Occupational Titles for standardization of titles
      d. Combining jobs

4. Handling employee participation

D. Organizing collected job data
   1. Design of forms and questionnaires

NOTE: Trainees should have the opportunity to design two or three different forms or questionnaires for data collection. Questionnaires should be geared for technical, clerical, and supervisory jobs.

   2. Provision for inclusion of all factors
   3. Recording of job information
   4. Analysis of collected data
      a. For inclusion in job description
      b. Quantitative versus judgment methods
   5. Presentation techniques

TOPIC VIII. JOB DESCRIPTIONS

A. Purposes of job descriptions
   1. Definition of jobs
   2. Use in job evaluation
   3. Use in grievance investigation
   4. Employment interviewing and selection
   5. Evaluation of internal employee communications
   6. Planning manpower requirements
   7. Job performance standards and evaluation
   8. Use in training
   9. Promotion and transfer arrangements
   10. Reassessment of work schedules
   11. Cost reduction

B. Rules for writing job descriptions

C. Individual job description writing practice

NOTE: It is suggested that the teacher have prepared job data available (questionnaires, interview results, etc.) which trainees may use as a base for writing job descriptions.

D. Evaluation of written job descriptions
   1. Group critique and discussion
   2. Teacher critique

TOPIC IX. JOB SPECIFICATIONS

A. Purposes of job specification

B. Elements of job specification
   1. Skills—education, experience, etc.
   2. Effort—physical, mental
   3. Responsibilities—equipment, process, materials, people
   4. Working conditions

C. Elements as used in various methods
   1. Factor comparison
   2. Ranking
   3. Point rating
   4. Others

D. Purpose and use of "benchmark" jobs in job specifications

E. Weighting of job specification elements

F. Individual job specification writing practice

NOTE: The teacher should give trainees the opportunity to prepare job specifications under a variety of methods, using previously written job descriptions and job data. Special attention should be given to the methods trainees use to arrive at specifications.

G. Evaluation of job specifications
   1. Group critique and discussion
   2. Teacher critique

TOPIC X. JOB EVALUATION TECHNIQUES

A. Measurement of entire job
   1. Job ranking
   2. Job classification

B. Measurement of job elements
   1. Factor-comparison
   2. Point system
   3. Profile method
   4. Others

C. Criteria for choosing method
   1. Objectivity
   2. Simplicity
   3. Acceptability
   4. Flexibility
   5. Adaptability to organization needs

NOTE: Teachers should provide for training practice in evaluating jobs using a variety of systems or plans. Use of "benchmark" jobs should be stressed. Practice should also be given in drawing up progressions in jobs and in developing wage and salary curves.

TOPIC XI. INSTALLING A JOB EVALUATION PLAN

A. Proposed course of action

B. Evaluation of cost

C. Presentation to management

D. Role of the personnel department

E. Role of the supervisor

F. Communication of the program to all employees

G. Maintenance and periodic audit of the program

H. Introduction of change and problems in job evaluation

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BELCHER, D. W. *Wage and Salary Administration, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.
CHRUDEN, H. J. AND SHERMAN, A. W. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 1963. Examinations.
FLIPPO, E. B. *Principles of Personnel Management.* New York: McGraw-Hill, 1961.
LANGSNER, A. *Wage and Salary Administration.* Cincinnati: South-Western, 1961. Instructor's Manual.
LANHAM, E. *Administration of Wages and Salaries.* New York: Harper and Row, 1963.
LOVEJOY, L. C. *Wage and Salary Administration.* New York: Ronald Press, 1959.
PATTON, J. A. AND LITTLEFIELD, C. L. *Job Evaluation: Text and Cases.* Homewood, Ill.: Richard D. Irwin, Inc., 1957.
PIGORS, P. AND MYERS, C. A. *Personnel Administration, 5th ed.* New York: McGraw-Hill, 1966.
SCOTT, W. D.; CLOTHIER, R. C.; AND SPRIEGEL, W. R. *Personnel Management, 6th ed.* New York: McGraw-Hill, 1961.
SHARTLE, C. L. *Occupational Information: Its Development and Application, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.
TIFFIN, J. AND MCCORMICK, E. J. *Industrial Psychology, 5th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

MATERIAL SPECIFICATIONS (MS)

Basic Skill for: Purchase-Price Analyst, General Foreman, Procurement Services Supervisor, Property-Disposal Officer, Purchasing Agent, Contract and Order Administrator

Hours Class: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

This unit is designed to help trainees develop skill in determining the correct sources for certain product, material, or equipment specifications, and checking items, received or shipped against these specifications. Because certain trainees will require a knowledge of writing simple specifications for ordering purposes, teachers should allow some time for practice in specification writing. The unit is not exhaustive in its exploration of the various sources or references used for standards and specifications. Particular on-the-job training and cumulative experiences in a job will develop an awareness of specific standards or specifications used in a particular industry. Those standards and specifications to which trainees will be exposed in this unit are representative of the types which are in general use.

The unit opens with an analysis of the importance of standards and specifications. The various sources of information used for specifying, such as the American Society for Testing Materials (ASTM), National Electrical Manufacturers Association (NEMA), American Standards Association (ASA), Underwriters' Laboratories (UL), military specifications (MIL specs), are explored with a view toward developing trainee familiarity with these references. The properties of specifications are discussed next. The uses of specifications and standards by various departments are explored and related to the career objectives of the trainees. Typical details of various specifications, environmental, electrical, mechanical, raw material, job, equipment, packaging, etc., are examined. Practice in reading and writing these specifications should be given. Finally, practice should be given in making product and material inspections for conformity to specifications, together with clerical recording of findings.

It is suggested that teachers have various standard and specification information sources available for class use. In addition, copies of bills of materials, and packing and packaging specifications should be available in class. Simple measuring and inspecting devices should be available for class use to check typical materials which may be obtained through the cooperation of local manufacturers or assemblers of equipment.

Standards of Achievement

1. Demonstrate ability to find and understand military and commercial specifications.
2. Demonstrate ability to write simple material or product specifications.
3. Demonstrate ability to read bills of material.
4. Compare physical components for compliance with specifications.
5. Use simple instruments for inspecting, checking, and examining products, materials, or assembly components.

Prerequisites for Study of Material Specifications

Trainee selection standards.

Topic Outline

I. General Information
II. Sources of Information
III. Justification for Specification
IV. Basic Properties of a Specification

V. Use of Specification in Purchasing Department
VI. Uses of Specifications in Incoming Inspection
VII. Uses of Specifications in Outgoing Inspection and Shipping
VIII. Testing for Compliance
IX. Details of an Environmental Specification
X. Details of an Electrical Specification
XI. Details of a Mechanical Specification
XII. Details of a Raw Material Specification
XIII. Equipment and Job Specifications
XIV. Packaging to Specification
XV. Methods and Tools Used for Checking
XVI. Clerical Practice in Checking and Recording Specifications

TOPIC I. GENERAL INFORMATION

A. Purpose of specifications
   1. Need for uniformity
   2. Need for reliability
B. Benefits to users
   1. Military
   2. Commercial

TOPIC II. SOURCES OF INFORMATION

A. Military specifications (MIL specs)
B. Commercial specifications—ASTM, NEMA, ASA, UL
C. Standards (MIL and commercial)—EIA and others

TOPIC III. JUSTIFICATION FOR SPECIFICATION

A. Interchangeability (spares)
B. Reliability (tie-in with time factor)
C. Interface (between equipments)

TOPIC IV. BASIC PROPERTIES OF A SPECIFICATION

A. Rigidity
B. Clarity
C. Authority

TOPIC V. USE OF SPECIFICATION IN PURCHASING DEPARTMENT

A. Establishing project
   1. Ordering parts
   2. Altering when purchasing applies the required specification
B. Issuing the purchase order
   1. Purchasing department responsibility
   2. Drawings or other information the vendor should receive with the purchase order
   3. Purchase order copyholders

NOTE: Teachers should use realistic examples to demonstrate the above processes. Trainees should be given examples for practice.

TOPIC VI. USES OF SPECIFICATIONS IN INCOMING INSPECTION

A. Uses of purchase orders
B. Uses of specifications
C. Receiving clerk's function related to checking conformity to specifications
D. Types of specifications used at incoming inspection

TOPIC VII. USES OF SPECIFICATIONS IN OUTGOING INSPECTION AND SHIPPING

A. Outgoing inspection
   1. Uses of contract
   2. Uses of job specification
   3. Uses of equipment specification
   4. Who checks product conformity
B. Shipping department
   1. Following specifications for shipping
   2. Following specifications for packaging

TOPIC VIII. TESTING FOR COMPLIANCE

A. Environmental
   1. Test specification (method)
   2. Test personnel (government inspection plus contractor inspection)
   3. Testing done by outside company (when called for or when environmental chamber is needed)
B. Performance (mobile or airborne)
   1. Road testing (Munsen course)
   2. Shock and vibration testing on static stand
   3. Flight line test
   4. Airborne test

TOPIC IX. DETAILS OF AN ENVIRONMENTAL SPECIFICATION

A. Temperature
B. Pressure
C. Salt fog
D. Wind
E. Ice
F. Sheltered and unsheltered
G. Fungus
H. Humidity

TOPIC X. DETAILS OF AN ELECTRICAL SPECIFICATION

A. RF characteristics
   1. Voltage
   2. Current
   3. Frequency range
   4. Impedance
   5. Power level
   6. Bandwidth
   7. VSWR limits
   8. Noise figure
   9. Insertion loss
   10. Tolerances
   11. Others
B. Other characteristics
   1. Voltage
   2. Current
   3. Frequency
   4. Power
   5. Resistance
   6. Tolerance

TOPIC XI. DETAILS OF A MECHANICAL SPECIFICATION

A. Material—temper and hardness (Brinnell or other)
B. Finish (plus tolerance)
C. Dimensions (tolerances)
D. Physical tolerance (vibration, shock, impact)
E. Operational period (longevity or continuous operation)

TOPIC XII. DETAILS OF A RAW MATERIAL SPECIFICATION

A. Identity (particular alloy)
B. Chemical analysis (backed by certificate of analysis from supplier)
C. Temper (fullhard, ½ hard, ¼ hard, soft)
D. Finish
   1. For shipping
   2. To create surface resistance
   3. Plating as a protective coating
E. Dimensions (rolling tolerance, concentricity of rod stock, etc.)
F. Others

TOPIC XIII. EQUIPMENT AND JOB SPECIFICATIONS

A. Definitions
B. Equipment specification
   1. Materials involved (raw)
   2. Components and their specification
   3. Testing involved to prove performance
C. Job specification
   1. Equipment involved
   2. Intended use
   3. Possible use
   4. Testing involved to prove system

TOPIC XIV. PACKAGING TO SPECIFICATION

A. Packing—levels A, B, C, for preservation (see MIL–P–116)
B. Packing—levels A, B, C, for packing (see MIL–P–726)
C. Shipping standards
   1. American Railroads Standards (mention use of accelerometer for proof of performance in shipment)
   2. GBL (Government Bill of Lading)
      a. Stipulates carrier
      b. Responsibilities
   3. Carrier regulations
      a. National Motor Freight Classification
      b. Uniform Freight Classification
D. Spares packaging—Military standard for parts shipped to depots for immediate use or indefinite storage (mention MIL–P–17555)

TOPIC XV. METHODS AND TOOLS USED FOR CHECKING

A. Mechanical tools usage
   1. Micrometer
   2. Vernier capiler
   3. Steel rule
   4. Steel square
   5. Gauge blocks (Jo blocks)
   6. Go-no-go gauges
   7. Height gauges
B. Magnets
C. Chemical solutions
D. Indicators
   1. Temperature
   2. Indicating micrometer
   3. Optical flats
   4. Pressure gauges
   5. Weighing devices and balances
E. Electrical tools usage
   1. Voltmeter
   2. Ohmmeter
   3. Power meter
   4. Ammeter
   5. Capacitance meter

NOTE: Practice should be given in using a few of the measuring tools and devices listed above.

TOPIC XVI. CLERICAL PRACTICE IN CHECKING AND RECORDING SPECIFICATIONS

Texts and Other Teaching Materials

For work in this unit, the materials listed below would be helpful. Not all of the military specifications listed may be easily available since they are usually given only to persons having contracts with the government. Standards and specifications of the issuing societies may be obtained by writing to the sources. The list below includes addresses of sources for the materials. These addresses are *not* shown in appendix C.

Military Standards and Specifications

MIL–D–5028. *Drawings and Data Lists, Preparation of Manufacturers'.*
MIL–M–8910. *Manuals, Technical: Illustrated Parts.*
MIL–P–116. *Specification on Methods of Preservation.*
MIL–P–726. *Specification of Methods of Packing.*
MIL–P–17555. *Specification on Methods of Spares Packaging.*
MIL–S–26640. *Specifications, Electronic Support Systems, Preparation of.*
MIL–S–6644. *Specifications, Equipment, Contractor Prepared, Instructions for the Preparation of.*
MIL–S–25894A. *Specifications and Engineering Data for Cargo Handling Provisions in Air Vehicles.*
MIL–STD–104A. *Limits for Electrical Insulation Color.*
MIL–STD–104. *Supplement No. 1 Limits for Electrical Insulation Color (Color Comparison Chips).*
MIL–STD–12B. *Abbreviations, Drawings.*
MIL–STD–15, 1A, 2, 3. *Graphic Symbols for Electrical & Electronics Diagrams.*
MIL–STD–17B, 1, 2. *Mechanical Symbols.*
MIL–STD–18. *Structural Symbols.*
MIL–STD–275B. *Printed Wiring for Electronic Equipment.*
MIL–T–9941. *Technical Manuals: Ground C-E Equipment, Facility, Site, and System, Preparation of.*

For information concerning the specifications listed above write to:

Commanding Officer, U.S. Naval Supply Depot
5801 Tabor Avenue
Philadelphia, Pa. 19120

Commercial Standards and Specifications

Electronic Industries Association. *TR 134—Coaxial Transmission Line.* Engineering Department, Electronic Industries Association, 2001 I Street, NW., Washington, D.C. 20006

The following may be available from the American Standards Association.

ASA Y 14.1 *Section 1. Size and Format.*
ASA Y 14.4 *Section 4. Pictorial Drawing.*
ASA Y 14.15 *Section 15. Electrical Diagrams.*
ASA Y 14.17 *Section 17. Fluid Power Diagrams.*
ASA Y 32.16 *1965 Reference Designations.*

For the above standards write to:

American Standards Association
10 East 40th Street
New York, N. Y. 10016

National Electrical Manufacturers' Association. *Standards for Fractional Horsepower Motors.* National Electrical Manufacturers' Association, 155 East 44th Street, New York, N. Y. 10017.

Underwriters' Laboratories, Inc. *Standards for Wire.* Underwriters' Laboratories, Inc. 207 East Ohio Street, Chicago, Ill. 60611.

Carpenter Steel Co. *Stainless Steel Chart.* Carpenter Steel Co., Reading, Pa.

Allen Manufacturing Co. *Allen Technical Library Booklet G–23.* Allen Manufacturing Co., Hartford, Conn.

Additionally, the last four chapters of the text listed below are suggested. However, teachers should exercise care in using only that material which will give them backup for the unit, since some material goes beyond the scope of the unit.

Abbett, R. W. *Engineering Contracts and Specifications, 4th ed.* New York: John Wiley and Sons, 1963.

PROCEDURES WRITING (PW)

Functional Requirement for: Chief Clerk, Clerical Technician, File Service Worker, Junior Executive, Process-Description Writer, Office Manager, Trainee Manager, Branch Manager, Procurement Services Supervisor, Administrative Assistant, and all Level III jobs EXCEPT Direct-Mail Specialist

Hours Class: 1 hour daily — Total: 15 hours

Description and Teaching Suggestions

This intensive unit will acquaint trainees with the nature and purpose of written procedures, and it will teach the elements of writing procedures manuals. Supervisory and administrative trainees often may assist in writing procedures.

Since procedures writing is a special type of business writing, this unit can very well be integrated with Business Reports. Trainees may also study this unit in conjunction with Forms Design. The emphasis in this unit should be on practice in procedures writing. It is suggested that teachers prepare information to

be put into procedure form and assign this to the trainees.

Standards of Achievement

1. Write acceptable procedures for a variety of work situations as assigned.
2. Compile and organize simple procedures manuals.

Prerequisites for Study of Procedures Writing

Trainee selection standards.
Forms Design may be studied concurrently.

Topic Outline

I. The Purpose and Nature of Written Procedures
II. Preparation of Procedure Statements
III. Organizing a Procedures Manual
IV. Physical Appearance of a Manual
V. Distribution of Manuals

TOPIC I. THE PURPOSE AND NATURE OF WRITTEN PROCEDURES

A. Purpose of written directives
B. Types of written procedures
   1. How to perform a job
   2. How to process a form
   3. How to request a service
   4. How to reach an objective
C. Problems of preparing and communicating procedures
   1. Readability
   2. Approval
   3. Training in use of procedures
   4. Exceptions
   5. Revisions
   6. Distribution
D. Criteria for good written procedure
   1. Utility
   2. Clarity and simplicity for understanding
   3. Brevity
E. Terms used in procedures writing
   1. Policy
   2. Procedures
   3. Practices
   4. Rules
   5. Directives, bulletins, circulars, memos, manuals

TOPIC II. PREPARATION OF PROCEDURE STATEMENTS

A. Principles used in procedures writing
   1. Standard format of presentation
   2. Direct and easily read language
   3. Word economy
   4. Simple imperative sentences
   5. Completeness of information
   6. Logical sequence of instructions
      a. Section for each complete procedure
      b. Subsection for each worker or work station
   7. Supplements of organization charts, flow diagrams, and forms
   8. Acceptance by others
   9. Editing and revision
   10. Use of a trained procedures writer
B. Numbering systems
   1. Purpose (identification)
   2. Types of numbering systems
   3. Numbering of:
      a. Procedures
      b. Instructions
      c. Work stations
C. Approval
   1. Responsibility for first draft
   2. Circulation for criticism and revision
   3. Final agreement
   4. Signatures
D. Revisions

TOPIC III. ORGANIZING A PROCEDURES MANUAL

A. Contents of manuals
   1. Table of contents
   2. Foreword
   3. Instructions in use of manual
   4. Statement of supporting policies
   5. Statements of the procedures
   6. Sample completed forms
   7. Appendix
   8. Index
   9. Letter of transmittal
B. Grouping of topics
   1. Sectional headings
   2. Coding
   3. Tabbing by topic
C. Types of manuals
   1. Administrative, management, or supervisory
   2. Branch office
   3. Correspondence
   4. Office or clerk's
   5. Organization or company
   6. Personnel or salary administration
   7. Policy
   8. Service
   9. Standard operating procedures
D. Manual titles

TOPIC IV. PHYSICAL APPEARANCE OF A MANUAL

A. Criteria for determining a manual's physical composition
   1. Where will manual be kept
   2. How will it be used
   3. How often must material be removed or inserted
   4. How much can be spent on the manual
   5. What is binder mechanism
   6. What is cover material
B. Format for procedure statements
   1. Margins
   2. Dividers
   3. Style
   4. Numbering system
   5. Color
C. Duplicating processes

TOPIC V. DISTRIBUTION OF MANUALS

A. Controls over distribution
   1. Who is authorized to receive
   2. When may they be used outside the company
   3. Who authorized distribution outside the company
B. Availability to nonsupervisory personnel

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional references are listed in appendix D.

HAGA AND SCHRICKER. *Procedures and Procedure Manuals—Ideas for Management.* Cleveland: Systems and Procedures Association, 1964.

JOHNSON, H. WEBSTER. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KEITHLEY, ERWIN M. *A Manual of Style for the Preparation of Papers and Reports.* Cincinnati: South-Western, 1959.

MATTHIES, LESLIE. *The Management Role of a Procedures Manual—Ideas for Management.* Cleveland: Systems and Procedures Association, 1963.

NATIONAL INDUSTRIAL CONFERENCE BOARD. *Personnel Procedure Manuals, A Research Report from the Conference Board.* New York: National Industrial Conference Board, Inc., 1961.

PLACE, IRENE AND POPHAM, ESTELLE L. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966. (Chapter 18).

PLAYSCRIPT PROCEDURES, THE. *A New Tool of Administration.* New York: Office Publications, 1961.

RONAYNE, MAURICE F. *Twenty Tips for Issuing a Procedures Manual.* Cleveland: Systems and Procedures Association, 1959.

PRODUCTION CONTROL BOARDS AND CHARTS (CBC)

Functional Requirement for: Branch Manager, General Foreman, Contract and Order Administrator

Hours Class: 1 hour daily, Laboratory: 1 hour daily — Total: 60 hours

Description and Teaching Suggestions

This unit should help to develop an understanding of the methods used to measure the activities or needs of business endeavors, largely in the areas of planning and production progress. The day-to-day and even minute-to-minute decisions necessary to conduct business activities are usually made from oral or written reports, or from displayed information such as that given by up-to-date production boards and charts.

Trainees are expected to become familiar with the more commonly used boards and charts, and to develop skill in choosing the correct types for particular applications. In addition, the trainees should develop skill in posting, updating, and maintaining production charts.

Teachers should carefully assess previous experiences of the group and, for practice, should relate early charting problems to these experiences. For example, planning a vacation in complete detail or planning a household budget and recording expenses can be used advantageously to introduce planning and charting.

Part of the unit will have to be presented by lecture. However, trainees should be given ample practice in preparing charts. This will require that the teacher obtain large amounts of production information, including daily or hourly reports of production progress. It is suggested that the cooperation of a local manufacturing establishment be secured in developing this information. Numbers and types of products can be altered so as not to reveal actual information.

Equipment and materials, suggested for use in this unit, are:

Simple, erasable production boards
One large production chart or board for use in recording a variety of data
Graph paper for trainees for preparation of bar, line, or curve charts

Brochures or pamphlets from well-known manufacturers of boards and charts
Sample facts (previously detailed) for several practice problems
Colored pencils or crayons for chart preparation
Gantt or mechanical type charts.

Standards of Achievement

1. Prepare properly identified line, bar, and curve charts of production progress.
2. Prepare legible and readable production charts.
3. Demonstrate ability to choose proper types of charts to record production activities.
4. Record information properly on Gantt and mechanical charts.

Prerequisites for Study of Production Control Boards and Charts

Trainee selection standards.

Topic Outline

I. Brief Review of Business Organization and Production Activities
II. Uses of Production Control Boards and Charts
III. Types and Uses of Production Charts
IV. Special Charts and Boards
V. Automation of Production Control Activities
VI. Recording and Maintaining Production Information
VII. Factors in Selecting Types of Boards and Charts

TOPIC I. BRIEF REVIEW OF BUSINESS ORGANIZATION AND PRODUCTION ACTIVITIES

A. Coordination of business activities
   1. Design
   2. Marketing
   3. Production and purchasing
   4. Accounting
B. Need for information to executives
   1. Planning
   2. Directing
   3. Decisionmaking
C. The profit motive

NOTE: Teachers should present topic I briefly, highlighting the production information aspect. Items such as shipping, receiving, storing, and purchasing of goods should be emphasized, with stress on the accuracy of records.

TOPIC II. USES OF PRODUCTION CONTROL BOARDS AND CHARTS

A. Where control boards and charts are used
   1. Production
   2. Advertising
   3. Sales and marketing
   4. Procurement (purchasing)
   5. Financial management
   6. Inventory control
B. Advantages of control boards and charts
   1. Provide visual information concerning activities
   2. Conciseness
   3. Provide rapid access to pertinent information
   4. Allow for changes to be made rapidly
   5. Provide basis for quick comparison of planned activities or schedules versus accomplishments to date
   6. Provide view of past, current, and future activities
   7. Provide control by exception (spots problem areas)

TOPIC III. TYPES AND USES OF PRODUCTION CHARTS

A. Line or curve chart
   1. Plots trends of two factors
   2. Two-dimensional
B. Bar chart
   1. Provides comparison of two accumulating factors
   2. Differences in planned versus actual accomplishment readily observed

NOTE: Trainees should practice preparing line, curve, and bar charts for various types of activities before practicing on project, load, and progress charts.

C. Progress chart
   1. Compares actual versus planned accomplishment
   2. Identifies trouble areas rapidly
D. Load chart
   1. Hour-by-hour details of production
   2. Used for both machines and entire department planning and recording of achievements
E. Project chart
   1. Preschedules men and machines for total effort
   2. Indicates sequences of activities
   3. Coordinates time, material, and machines
   4. Provides sundry information
      a. Back-orders and shortages

b. Changes in effort and scope
c. Vendor coordination

5. PERT (Program Evaluation Review Technique)

NOTE: Discuss subtopic E (5) briefly at this stage. It is suggested that samples of PERT charting be shown and explained. Indicate the extent of the work that must be done before a PERT chart is made up.

TOPIC IV. SPECIAL CHARTS AND BOARDS

A. Gantt chart
   1. Operations chart providing three dimensions—past, current, and planned accomplishments
   2. Provides greater control for planning
   3. Details product, assembly, or assembly component description, machines to be used, procurement schedules; schedules rates of production; and visually displays accomplishment

NOTE: Trainees should be given practice in preparing simple Gantt type charts.

B. Mechanical charts and boards
   1. Devices used
      a. Pegs
      b. Strings
      c. Pins
      d. Tapes
      e. Clips
      f. Cards
   2. Color coding
   3. Overlays and multinote tags
   4. Pocket panel types
   5. Magnetic boards
   6. Advantages of mechanical charts or boards

NOTE: Trainees should be given practice in the use of mechanical charts and boards. Facilities and funding will limit the number of these items that will be available. Brochures about some of these special devices should be made available. If possible, a trip to a local manufacturer who uses control boards and charts should be planned so that trainees may see the actual recording and change processes.

TOPIC V. AUTOMATION OF PRODUCTION CONTROL ACTIVITIES

A. Computers
B. Punched-card or tape system
C. Printed reports of progress

NOTE: Trainees should develop an awareness of the use of automated recording production progress in larger establishments. Such items as critical points, production trends, stock control, and demands for items and how computers and other automated records are set to handle them should be explored.

TOPIC VI. RECORDING AND MAINTAINING PRODUCTION INFORMATION

A. Comprehensive and detailed knowledge of the work to be done required for planning
B. Knowledge of required materials and availability
C. Knowledge of types and productivity of personnel
D. Development of standards
E. Methods of reporting production
   1. From sources
      a. Production departments
      b. Sales managers
      c. Vendors
      d. Stock control
   2. Oral information
F. Importance of immediate recording of progress and maintenance of boards and charts
G. Importance of advice to responsible executives regarding delays and causes

TOPIC VII. FACTORS IN SELECTING TYPES OF BOARDS AND CHARTS

A. Need for immediacy of information
B. Types of information to be recorded for planning and accomplishment
C. Extent of detailing information
D. Visibility
E. Ease of changing and recording
F. Accessibility
G. Size
H. Cost

Texts and Other Teaching Materials

The books suggested below contain information pertinent to this unit. The teacher may assign readings in these texts on production planning and control, PERT, and other subject areas. It is suggested that the teacher use some of the suggested texts as backup information for the unit.

AMERICAN SOCIETY OF TOOL AND MANUFACTURING ENGINEERS. *Manufacturing Planning and Estimating Handbook*. New York: McGraw-Hill, 1966.

AMRINE, H. T.; RITCHEY, J. A.; AND HULLEY, O. S. *Manufacturing Organization and Management, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

BUFFA, E. S. *Modern Production Management, 2nd ed.* New York: John Wiley and Sons, 1965.

CARROLL, PHIL. *How To Chart Data.* New York: McGraw-Hill, 1960.

FINLEY, R. E. AND ZIOBRO, H. R. (eds.). *The Manufacturing Man and His Job.* New York: American Management Association, 1966.

KEITH, L. A. AND GUBELLINI, C. E. *Business Management.* New York: McGraw-Hill, 1958.

LEVIN, R. I. AND KIRKPATRICK, C. A. *Management Planning and Control with PERT—CPM.* New York: McGraw-Hill, 1966.

MACNIECE, E. H. *Production Forecasting, Planning, and Control, 3rd ed.* New York: John Wiley and Sons, 1961.

MARTINO, R. L. *Finding the Critical Path, Project Management and Control, Volume I:* New York: American Management Association, 1964.

———. *Applied Operational Planning, Project Management and Control, Volume II.* New York: American Management Association, 1964.

———. *Allocating and Scheduling Resources, Project Management and Control, Volume III.* New York: American Management Association, 1965.

PRITZKER, R. A. AND GRING, R. A. (eds.). *Modern Approaches to Production Planning and Control.* New York: American Management Association, 1960.

TAUSSIG, J. N. *EDP Applications for the Manufacturing Function.* New York: American Management Association, 1966.

VORIS, W. *The Management of Production.* New York: Ronald Press, 1960.

In addition, the teacher should obtain informational brochures on various boards and charts from manufacturers of these types of items. Some manufacturers in the field are listed below:

Acme Visible Records, Inc., 2210 West Allview Drive, Crozet, Va. 22932

Graphic Systems, 925 Danville Road, Yanceyville, N.C. 27379

Magna-Visual, Inc., 1200 N. Rock Hill Road, St. Louis, Mo. 63124

Magnetic Aids, Inc., 11 West 42 Street, New York, N.Y. 10036

Methods Research Corp., 60 Willow Avenue, Staten Island, N.Y. 10305

Rol-A-Chart, Somerset, Calif. 95684

Wassell Organization, Inc., 25 Sylvan Road South, Westport, Conn. 06880

PRODUCTION REPORTS, ESTIMATES, AND SCHEDULES (RES)

Functional Knowledge for: Branch Manager, General Foreman, Procurement Services Supervisor, Contract and Order Administrator, Industrial Organization Manager

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to acquaint trainees with the importance of the production planning functions and the various factors involved in planning and scheduling. Since these functions are performed by various manufacturing and production executives, the emphasis in this unit is on the facilitating functions and clerical activities to be performed by trainees for the listed jobs. The use of modern data processing methods and systems in production should be explored in as much depth as time permits.

Teachers should have available, for trainee practice, documents and records that are used in production planning and control operations. Posting and computing exercises should be an integral part of trainee practice.

Standards of Achievement

1. Demonstrate knowledge of internal and external factors affecting production estimating and scheduling.
2. Read production schedules.
3. Demonstrate ability to prepare production reports from basic production records.
4. Prepare production schedule charts and post information on charts.

Prerequisites for Study of Production Reports, Estimates, and Schedules

One year of postsecondary training or the equivalent in plant operational activities.

Topic Outline

I. Introduction
II. Production Reports
III. Production Estimates
IV. Production Schedules
V. Interdepartmental Relationships

TOPIC I. INTRODUCTION

A. Importance of reports, estimates, and schedules
   1. Effect on product planning
   2. Coordination with marketing effort
   3. Determining costs

B. Definitions
   1. Production report
   2. Production estimate
   3. Production schedule

TOPIC II. PRODUCTION REPORTS

A. Purpose and scope
B. Basis for review and forecasting
C. As an operational analysis tool
   1. Coordination of production activities
   2. Overlapping of functions
   3. Duplication of effort
D. Elements of a good report
   1. Organization
   2. Objectivity
   3. Clarity
   4. Timeliness
   5. Completeness with brevity
E. Basic records for reports
   1. Blueprints and bills of materials
   2. Times for fundamental operations
   3. Production routing records
   4. Inventory records
      a. Raw material
      b. In-process stock
      c. Finished assemblies
      d. Machinery, equipment, tools, jigs, and fixtures
   5. Personnel availability
   6. Other records
      a. Production
      b. Waste and rejects
      c. Sales
      d. Absenteeism
      e. Machine performance including down-time
F. Quality of basic records for reports
   1. Accuracy
   2. Ease of reference and retrieval
   3. Proper arrays
   4. Specificness
   5. Value for current use
G. Records and automation

TOPIC III. PRODUCTION ESTIMATES

A. Bases for formulation
   1. Sales forecasts
   2. Market conditions
   3. Customer expectations
   4. Plant physical capacities
B. Factors to be included
   1. Operational sequence
   2. Machine availability—load time
   3. Personnel availability and capabilities—learning time
   4. Materials availability (inventory of goods)
   5. Prefabricated materials
   6. Contractual commitments
      a. Customer
      b. Labor organization
      c. Vendors
   7. Procurement problems
   8. Backorder situation
   9. Redesign problems
   10. New process problems
   11. Inspection time
   12. Cost analysis

TOPIC IV. PRODUCTION SCHEDULES

A. How established
B. Governing factors
   1. External factors
      a. Consumer demand
      b. Customer delivery dates
      c. Dealer and retailer inventories
   2. Internal factors (See topic III, B)
C. Charts and control aids
   1. Master schedules (man-machine load charts)
   2. Process time
   3. Departmental schedules
   4. Gap phasing
   5. Lap phasing
D. Function of expediters in maintaining schedules
E. PERT charting

NOTE: Trainees should be given maximum opportunity to develop charts from operational data and sales forecast information. Practice or laboratory critique sessions should not be less than 15 to 20% of total unit hours.

TOPIC V. INTERDEPARTMENTAL RELATIONSHIPS

NOTE: While the subtopics indicate the functions of each department, the teacher should point out the interrelationships and the need for cooperation of various departments.

A. Engineering and sales department cooperation
B. Manufacturing department
   1. Fabrication
   2. Assembly
   3. Finishing
   4. Shipping
C. Marketing department
   1. Field sales
   2. Market research
   3. Advertising

D. Accounting department
   1. Cost estimating
   2. Cost controls
   3. Shop losses
   4. Premium pay
E. Industrial engineering department
   1. Plant layout
   2. Work simplification
   3. Time and motion economy
   4. Rate standards—incentives
F. Purchasing department
   1. Inventory control
   2. Buying

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BETHEL, L. L.; ATWATER, F. S.; SMITH, GEORGE H. E.; AND STACKMAN, H. A. *Essentials of Industrial Management, 2nd ed.* New York: McGraw-Hill, 1959.

———. *Industrial Organization and Management, 4th ed.* New York: McGraw-Hill, 1962. Correlated film series of 10 motion pictures.

BROWN, R. G. *Statistical Forecasting for Inventory Control.* New York: McGraw-Hill, 1959.

CARSON, G. B. (ed.). *Production Handbook, 2nd ed.* New York: Ronald Press, 1958.

KOEPKE, C. A. *Plant Production Control, 3rd ed.* New York: John Wiley and Sons, 1961.

LAZZARO, VICTOR (ed.). *Systems and Procedures: A Handbook for Business and Industry.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

MACNIECE, E. H. *Production Forecasting, Planning, and Control, 2nd ed.* New York: John Wiley and Sons, 1958.

MAGEE, J. F. *Production Planning and Inventory Control.* New York: McGraw-Hill, 1958.

MAYER, R. R. *Production Management.* New York: McGraw-Hill, 1962.

MILLER, R. W. *Schedule, Cost, and Profit Control with PERT.* New York: McGraw-Hill, 1963.

MOORE, F. G. *Production Control, 2nd ed.* New York: McGraw-Hill, 1959. Problems and cases.

PAPPAS, F. G. AND DIMBERG, R. A. *Practical Work Standards.* New York: McGraw-Hill, 1962.

VORIS, W. *The Management of Production.* New York: Ronald Press, 1960.

QUALITY CONTROL PRACTICES (QC)

Functional Knowledge for: Purchasing Agent, General Foreman, Industrial Organization Manager, Contract and Order Administrator

Hours Class: 1 hour daily — Total: 20 hours

Description and Teaching Suggestions

This unit is designed to acquaint managerial and supervisory trainees with the importance of quality control to efficient operation of a producing plant. Two methods of quality control are examined initially, and then the unit concentrates on characteristic quality control through statistical methods. It is not intended that trainees develop statistical skills used in quality control, but their introduction will be in sufficient depth to enable them to understand the nature of the work.

Although teachers will present the unit largely through lectures, problems and cases should be assigned for homework and discussion in class. The emphasis should be on the usefulness of quality control methods to production planners and managers.

Standards of Achievement

1. Know the essential differences between attribute and characteristic inspection methods.
2. Know the following methods of sampling: single, double, multiple, sequential.
3. Know the complexities involved in multivariate quality control techniques.
4. Know the benefits of quality control.

Prerequisites for Study of Quality Control Practices

Trainee selection standards. Proficiency in mathematical computation is desirable.

Topic Outline

I. Quality Control Programs
II. Quality Control Methods
III. Statistical Methods in Quality Control Practice

TOPIC I. QUALITY CONTROL PROGRAMS

A. Definition of quality control
B. Necessity for quality control
   1. Legal aspects of purchasing agreements and purchases
   2. Customer satisfaction with product
   3. Assurance of meeting contractual requirements

4. Lowered process costs
   a. Control of inbound material
   b. Control and correction process, machines, manpower productivity
   c. Lowered reject ratio
5. Control of salvage operations
6. Wage computation on incentive type programs
7. Lowering of shipment costs
8. Reduction of accounting effort (handling replacement, rejects, adjustments, etc.)
9. Importance to proper production planning
10. Decreased inventories

C. Responsibility for quality control
   1. Sales department
   2. Purchasing department
   3. Engineering and production engineering departments
   4. Production department
   5. Quality control department
   6. Receiving department
   7. Contracting division
   8. Others

D. Specifications and standards
   1. Contractual
   2. Engineering, purchasing, and production
   3. By industry and government
      a. American Society of Mechanical Engineers (ASME)
      b. American Society for Testing and Materials (ASTM)
      c. National Electrical Manufacturers Association (NEMA)
      d. Society of Automotive Engineers (SAE)
      e. United States Pharmacopoeia (USP)
      f. Underwriters' Laboratories (UL)
      g. American Standards Association (ASA)
      h. Army and Navy Military Specifications and Standards (especially MIL–STD–105A)
      i. Aeronautical Standards and Specifications

E. Instituting a quality control program
   1. Administrative decisions
   2. Personnel (inspectors, statisticians, etc.)
   3. Facilities
   4. Methods

TOPIC II. QUALITY CONTROL METHODS

A. 1. By attribute
   2. By characteristic(s)
   3. Impracticality of 100 percent inspection
      a. Amount of material involved
      b. Type of test
         (1) Destructive (fuels, explosives, etc.)
         (2) Useful life
         (3) Total reliability of piece
   4. When necessary
   5. Components and subassemblies

B. Inspection by sampling
   1. Lots and randomizing
   2. Single, double, sequential, and multiple
   3. Dodge-Romig Tables (MIL–STD–105A)
   4. Empirical sampling methods

C. Process quality control methods

D. Quality control charts

E. Zero defects methods

TOPIC III. STATISTICAL METHODS IN QUALITY CONTROL PRACTICE

A. Laws of probability and distribution

B. Standard deviations

C. Process average and variance

D. Control limits
   1. Medians
   2. Ranges

E. Zero defects practice

F. Review of sampling methods and formulas

G. Risk of decision to accept or reject
   a. Producer's standards
   b. Consumer's standards
   c. AQL (lowest acceptable lot quality)

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

FEIGENBAUM, A. V. *Total Quality Control.* New York: McGraw-Hill, 1961.

GEORGE, C. S., JR. *Management in Industry, 2nd ed. (Part VII).* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

HANSEN, BERTRAND L. *Quality Control: Theory and Applications.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

JURAN, J. M. *Quality Control Handbook, 2nd ed.* New York: McGraw-Hill, 1962.

RICHMOND, S. B. *Statistical Analysis, 2nd ed.* New York: Ronald Press, 1964.

TIMMS, HOWARD L. *The Production Function in Business: Management Division Systems.* Homewood, Ill.: Richard D. Irwin, Inc., 1966.

SHIPPING REGULATIONS AND PROCEDURES (SRP)

Specialized Knowledge for: Tariff and Schedules Examiner

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is largely concerned with developing knowledge and practice in shipping and traffic department office recordkeeping, origination of documents for shipping, and tariffs. It also allows for developing familiarity with the various methods used for preparing shipments, the regulations published by various carriers (including the post office), and a working knowledge of tariff reference sources for both domestic and international shipments.

The emphasis in the unit should be on the "how-to" of choosing methods of shipment, abiding by carrier and customer regulations and specifications for packaging (packing) and shipment, and providing for insurance of shipment. Teachers should therefore limit lectures to the introductory phases. It is suggested that teachers have available as many of the documents as possible for trainee practice; e.g., rate guides, tariffs, and classifications. Shipping problems should be prepared by the teacher in advance for study and homework assignments.

Field trips to major shippers, carriers, and large post offices are suggested for first hand observation and trainee reports of shipping and freight handling practices.

Visual presentations by slides, filmstrips, and motion pictures are suggested to strengthen familiarity with forms, and material handling and packaging methods. Representatives from the post office, carriers, and manufacturers of containerboard packings should be asked to give special presentations to the group. Discussions by trainees should be encouraged throughout the unit.

Trainees can be evaluated using objective tests and work done on practice problems.

Standards of Achievement

1. Describe suitable materials for packing solids, liquids, and fragile items for shipment.
2. Prepare sample bill of lading, express receipt, United Parcel Service manifest, etc.
3. Prepare simple rate chart from one to ten others (at least two international), showing costs via different methods of shipping.
4. Compute weight break-point on different methods of shipping.
5. Determine insurance costs on sample shipments via different methods of shipping.
6. Determine whether shipper or carrier should load or unload various kinds of shipments.
7. Know advantages and disadvantages of various shipping methods.
8. Select proper acid or explosive labels for shipments.
9. Select best method of shipping various materials between different points.
10. Understand the use of various shipping references and classifications.
11. Know proper procedures when preparing material for shipment.
12. Understand the purpose and use of various shipping documents and forms for domestic shipments.
13. Understand the basic differences between domestic and international shipments.
14. Understand role of regulatory agencies governing different methods of shipment.

Prerequisites for Study of Shipping Regulations and Procedures

Trainee selection standards.

Topic Outline

I. Importance of Traffic Flow and Adherence to Shipping Regulations
II. Carriers
III. Shipping Terminology
IV. Tariffs
V. Shipping Rates
VI. Foreign Trade
VII. Choosing Methods of Shipping
VIII. Packaging Materials for Shipment
IX. Freight Service and Rates
X. Using the U.S. Mail for Shipments
XI. Shipping Procedures
XII. Documentation of Shipments
XIII. Loading and Unloading Practices
XIV. Addressing and Labeling

TOPIC I. IMPORTANCE OF TRAFFIC FLOW AND ADHERENCE TO SHIPPING REGULATIONS

A. Importance of proper traffic flow
   1. For expeditious dispatch of materials

2. For customer service
3. For cost reduction—production, avoiding spoilage, etc.

B. Inventory control
1. Relationship to traffic flow
2. Procedures compatible with shipping regulations and procedures

C. Need for documenting traffic movement
1. Invoicing
2. Claims
3. Tracing

D. Regulatory agencies and their functions
1. Interstate Commerce Commission
2. Federal Aviation Agency
3. Civil Aeronautics Board
4. U.S. Customs
5. U.S. Public Health Service
6. U.S. Department of Commerce

E. Reasons for shipping regulations
1. Protection of receiver
2. Protection of shipper and other shippers
3. Protection of carrier
4. Customer or receiver requirements
   a. Private sector—individual
   b. Industrial sector
   c. Military specifications
5. Protection of other goods

F. Importance of adhering to specific shipping regulations
1. Customer retention
2. Production or business loss
3. Safety of persons involved—shipper, carrier, receiver
4. Legal and carrier requirements
5. Insurance company requirements
6. Law suits

TOPIC II. CARRIERS

A. Definition
1. Common
2. Contract

B. Responsibilities
1. To shipper
2. To consignee
3. To carrier's personnel
4. To transshippers
5. To other carriers
6. To government—legal requirements

C. Types of carriers
1. Truck
2. Railroad
3. Air freight
4. Steamship
5. Bus package
6. Parcel delivery
7. Messenger
8. Post Office
9. REA

D. Carrier regulations for shipments
1. Uniform Freight Classification
2. National Motor Freight Classification
3. Interstate Commerce Commission regulations
4. U.S. Post Office Department manuals of standards and rules
5. Official Express Classification

NOTE: The teacher should have copies of these publications available for trainee familiarization. No attempt should be made to study the various regulations in detail. However, trainees should develop skill in finding where the appropriate regulations of various carriers, governing shipment of a particular commodity or item may be found and how to look into the details. The Texts and Other Teaching Materials section of this unit and the Sources of Educational Materials appendix should be consulted for information about obtaining copies of the items listed under subtopic D.

TOPIC III. SHIPPING TERMINOLOGY

A. C.O.D. and prepaid
B. Bills of lading—uniform straight, order
C. Waybills and manifests
D. F.O.B.—origin and destination
E. C.I.F.
F. CL and LCL
G. Demurrage
H. Arrival notices
I. Commodity class and rates
J. Pooling—pools, pool cases, etc.
K. Freight forwarders, consolidators, etc.

NOTE: Only the most common terms have been listed above. Teachers should refer trainees to the various classifications and regulations for expansion of terminology, since these sources contain definitions and glossaries.

TOPIC IV. TARIFFS

A. Tariffs defined
B. Rates
1. How established
2. Specific duties
3. Ad valorem duties
4. Graduated rates

C. Variations
1. Air
   a. Air Express Tariff
   b. Official Air Transport Restricted Articles Tariff No. 6–C

2. Rail
   a. Tariff No. 15 (railroads—covering explosives and dangerous articles)
   b. Freight Container Tariff Series
3. Motor
   a. Motor Carriers' Explosive and Dangerous Articles Tariff No. 12.
   b. Southern Freight Association Container and Loading Rules Tariff 823–Series
4. Steamship

TOPIC V. SHIPPING RATES

A. As found in tariffs
B. As found in freight rate guides
C. As determined by carrier
D. Comparing shipping rates
   1. On basis of nature of item to be shipped—commodity class
   2. Quantity—weight or volume, CL, LCL, etc.
   3. Shipping distance—miles, zones
   4. Consolidated shipments
   5. Comparison of one mode versus others
      a. REA versus motor carrier
      b. Parcel Post versus United Parcel Service
      c. Air versus truck
E. Break points and comparisons

TOPIC VI. FOREIGN TRADE

A. Export procedure
   1. Shipper's export declaration
   2. Consular invoices
   3. Commercial invoices
   4. Certificate of origin
   5. Bills of lading
   6. Proper channels for forwarding documents
B. Exchange controls
C. Import quotas and license restrictions
D. Export subsidies
E. Blocked currency systems
F. Types of international barter agreements

TOPIC VII. CHOOSING METHODS OF SHIPPING

A. Air, mail, rail, motor, or steamship
   1. Determine factors
   2. Advantages and disadvantages of each
B. Rates (see topic V)
C. Urgency of delivery
D. Distances and customer locations
   1. Domestic customers
   2. International customers
E. Packaging and handling requirements
F. Break points
G. Type, size, weight, and bulk or volume of items to be shipped
H. Customer preferences

TOPIC VIII. PACKAGING MATERIALS FOR SHIPMENT

A. Methods of packaging
   1. Bags, bales, and bundles
   2. Baskets, boxes, and cabinets
   3. Cans, in cars, cases, and crates
   4. Cylinders, drums, tubes, and rolls
   5. Loose methods
   6. Packages (as specified in the classification)
   7. Trunks and pails
   8. Miscellaneous
B. Outer packing materials
   1. Wood
   2. Corrugated paper and fibreboard
   3. Metal, plastic, and glass
   4. Cloth
C. Inner packing materials
   1. Paper—shredded and wadded
   2. Corrugated paperboard and fibreboard
   3. Styrofoam and other plastics
   4. Special and miscellaneous materials
D. Combination of materials
E. Shipments containing combinations of packaging
F. Palletizing
G. Packaging explosives, dangerous articles, and contaminants
H. Strapping and banding practices
I. Hand versus machine packaging
J. Penalties on shipper for failing to package and identify commodity or material properly (See Freight Classification Rules)

TOPIC IX. FREIGHT SERVICE AND RATES

NOTE: The various freight guides and classifications should be consulted by trainees to solve shipping problems concerning rates which have been prepared in advance by the teacher.

A. Class rates
B. Commodity rates
C. Quantity rates
D. Packaging factors in rates
E. Freight service—speed, care, routing, and rerouting
F. Penalties for failure to comply with regulations

TOPIC X. USING THE U.S. MAIL FOR SHIPMENTS

A. Special postal services and rates
   1. Air parcel
   2. Educational materials
   3. Special handling
   4. Special delivery
   5. Combination mailing
   6. Certificate of mailing
   7. Pool cases
   8. Certified and registered mail
   9. Insured mail
   10. Return receipt requests
B. Bulk mail procedures
C. Stamping and imprinting procedures
D. Classes of mailing and rates
   1. First-, second-, third-, and fourth-class mail
   2. Specifications, limitations, and regulations
E. Postal regulations
   1. Postal Manual—chapter 1
   2. Special regulations—explosives, fruit, vegetables, etc.
F. International mail
G. Addressing and labeling practice
H. Postal documentation
   1. Receipts for parcels and envelopes
   2. Receipts for charges
   3. Certificates
   4. Miscellaneous receipts

TOPIC XI. SHIPPING PROCEDURES

A. Inspection of shipment
   1. Quantity—counting, weighing, and measuring
   2. Size or volume
   3. Type or nature of items
   4. Adherence to customer, military, or manufacturing specifications for packaging
B. Condition and correctness of assembled order of packages, pallets, bundles, etc.
C. Adequacy of packing (See Freight Classification Rules)
D. Identification—1 of 3, 2 of 5, 5 of 5, etc.—of packages, bundles, or groups
E. Comparison of items (packages, bundles, bales, etc.) with shipping document and shipping order
F. Checking consignee address
G. Obtaining rates and rate comparisons
H. Shipping by method of preference in shipper's location
I. Handling of shipment in shipper's location

TOPIC XII. DOCUMENTATION OF SHIPMENTS

A. Shipper's order
B. Documents for carriers
   1. Uniform straight bill of lading
      a. REA
      b. Motor carrier
      c. Railroad
      d. Steamship
   2. Order bill of lading
   3. Sight draft
   4. Government bill of lading
   5. Manifests
      a. REA
      b. Consolidators
      c. United Parcel Service
   6. Air freight waybill
   7. Notifications—arrival notices, etc.
   8. Express receipts
      a. Rail
      b. Air
      c. Motor
   9. Others

NOTE: Teachers should have samples or copies of many of these documents available for trainee practice.

C. Prepaid and collect shipments documentation
D. Neatness, accuracy, and completeness of shipping documents
E. Coordination of documents with traffic and bookkeeping departments
F. Insurance
   1. REA—rail and air
   2. Parcel post
   3. Motor carrier
   4. United Parcel Service
   5. Railroad
   6. Air freight
   7. Marine shipments
G. Special documents for international shipments
   1. Export license
   2. Government approval
   3. Consular declaration
   4. Import license
   5. Others agreed upon by contract or required by countries of origin or destination
H. Certificates required by carriers—boxes, packages, etc.
I. Followups, tracers, and other forms
J. Loss and damage claim forms—against carriers or shippers

TOPIC XIII. LOADING AND UNLOADING PRACTICES

A. Shipper loading—advantages and disadvantages
B. Consignee unloading—advantages and disadvantages
C. Carrier loading or unloading—advantages and disadvantages
D. Effect on shipping costs of A, B, and C
E. Protection against damage, theft, spoilage, and leakage
F. Safety requirements

TOPIC XIV. ADDRESSING AND LABELING

A. Outside address
   1. Ultimate consignee
   2. Intermediate consignee
B. Inside address
C. Caution labels
   1. Perishable merchandise
   2. Fragile merchandise
D. Explosives labels

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

AGNEW, PETER L. AND MEEHAN, JAMES. *Clerical Office Practice, 3rd ed.* Cincinnati: South-Western, 1961.

ARCHER, FRED; BRECKER, RAYMOND; AND FRANKES, JOHN. *General Office Practice, 3rd. ed.* New York: McGraw-Hill, 1968.

Association of American Railroads, Official Rate Classification Book. Washington: Association of American Railroads. Issued periodically.

BULLINGER'S GUIDES, INC. *Bullinger's Postal and Shipping Guide.* New York: Bullinger's Guides, Inc. Issued periodically.

COLTON, R. C. AND WARD, E. S. *Practical Handbook of Industrial Traffic Management.* The Lord Baltimore Press.

CRAF, JOHN R. *Introduction to Business.* New York: Henry Holt, 1957.

EXPRESS AUDIT COMPANY, THE. *Express and Parcel Post Comparative Rate Guide.* Providence, R.I.: Express Audit Co. Issued periodically.

FRIEDMAN, SHERWOOD AND GROSSMAN, JACK. *Applied Clerical Practice, 2nd ed.* New York: Pitman Publishing Corp., 1962.

LEONARD, G. R. & CO. *Leonard's Guide for Parcel Post, Express, Freight, Rates, and Routing.* New York: G. R. Leonard & Co. Issued periodically.

LOCKLIN, D. PHILIP. *Economics of Transportation.* Homewood, Ill.: Richard D. Irwin, Inc., 1960.

NATIONAL MOTOR FREIGHT TRAFFIC ASSOCIATION. *National Motor Freight Classification.* Washington: National Motor Freight Association. Issued periodically.

PRICE, RAY; MUSSELMAN, VERNON; HALL, J. CURTIS; AND WEEKS, EDWIN. *General Business For Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

RAILWAY EXPRESS AGENCY. *Breaking Point Charts.* New York: Railway Express Agency, Inc. Issued periodically.

———. *Official Express Classification.* New York: Railway Express Agency, Inc. Issued periodically.

———. *Air Express Tariff No. 1.* New York: Railway Express Agency, Inc. Issued periodically.

REED, CLINTON A.; CONOVER, HOBART H.; AND STEARNS, ROBERT E. *Introduction to Business.* Boston: Allyn and Bacon, 1963.

TRADE SERVICE PUBLICATIONS, INC. *International Shipline Guide.* Los Angeles: Trade Service Publications, Inc. Issued periodically.

UNIFORM CLASSIFICATION COMMITTEE. *Uniform Freight Classification and Supplements.* Chicago: Uniform Classification Committee. Issued periodically with supplements.

U.S. Code.——*Title 15: Commerce and Trade (Interstate Commerce Act).* Washington: U.S. Government Printing Office, 1964.

UNITED STATES DEPARTMENT OF COMMERCE. *Essential United States Foreign Trade Routes.* Washington: U.S. Government Printing Office, 1963.

UNITED STATES POSTAL DEPARTMENT. *Directory of International Mail.* Washington: U.S. Government Printing Office. Issued periodically.

———. *Directory of Post Offices.* Washington: U.S. Government Printing Office. Issued periodically.

———. *National Zip Code Directory.* Washington: U.S. Government Printing Office. Issued periodically.

———. *United States Official Postal Guide.* Washington: U.S. Government Printing Office. Issued periodically.

TIME AND MOTION ECONOMY (TME)

Functional Knowledge for: Clerical Technician, File Service Worker, Process-Description Writer, General Foreman

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to introduce trainees to time and motion economy as used in manufacturing plants and offices. It is not intended that trainees develop proficiency in time and motion study or economy work since this work is in the province of the industrial engineer. It is intended, however, that the subject of time and motion economy and its application to production management be seen from the perspective of how it affects those persons in supervisory and administrative management positions. To develop an awareness of the effect that this work has

on an entire organization, several viewpoints on time and motion economy are presented, as well as the fundamental concepts of time and motion study and work simplification. Discussion should be encouraged to supplement class lectures and trainee reading assignments. Objective tests can be used to evaluate trainee progress. Trainees should be assigned to present a report on some phase of time and motion study or time and motion economy. The report should be considered in the evaluation of the trainee, together with the results of objective tests.

Standards of Achievement

1. Differentiate between work simplification and time and motion economy.
2. Demonstrate knowledge of time and motion study techniques, variables, and factors considered by industrial engineers and industrial psychologists.
3. Present arguments for and against time and motion economy as seen by production management, industrial engineers, industrial psychologists, employees, and labor organizations.
4. Demonstrate ability to do a simple time and motion study.

Prerequisites for Study of Time and Motion Economy

Trainee selection standards.

Topic Outline

I. History and Purpose of Time and Motion Economy
II. Work Simplification and Time and Motion Economy
III. Practice in Making a Simple Time and Motion Study
IV. Industrial Psychology Viewpoints
V. Employee Views on Time and Motion Economy
VI. Labor Organization Views on Time and Motion Economy
VII. The Employee Relations Department and Time and Motion Economy

TOPIC I. HISTORY AND PURPOSE OF TIME AND MOTION ECONOMY

A. Introduction of scientific management
   1. Taylor
   2. Gilbreth
B. Purpose of time and motion economy
   1. Increased productivity of worker
   2. Decreased fatigue
   3. Uniformity of measurement of productive rate
   4. Production scheduling and costs
   5. Rates of pay and wage incentives

TOPIC II. WORK SIMPLIFICATION AND TIME AND MOTION ECONOMY

A. Work simplification defined
B. Work simplification objectives
   1. Reduction or elimination of tasks
   2. Better placement of tools, materials, and equipment
   3. Substitution of machines or devices to facilitate manual tasks
   4. Combining task elements
C. Analysis methods in work simplification
   1. Flow charts
   2. Flow diagrams
   3. Analysis sheets and symbols
   4. Questioning approach
D. Time and motion study and economy differentiated and defined
   1. As part of work simplification
   2. As separate from work simplification
E. Objectives of time and motion economy
   1. Production goals—output, scheduling, and cost reduction
   2. Fair wage determination
   3. Reduction of worker fatigue
F. Objective and subjective elements involved in time and motion study and economy
   1. Methods of observing—personal, motion picture
   2. Allowances for variability in performance rate of workers
   3. Allowances for worker needs—physiological needs and conditions
   4. Allowances for worker fatigue
   5. Measuring instruments used
   6. Estimates and ratings by observer

TOPIC III. PRACTICE IN MAKING A SIMPLE TIME AND MOTION STUDY

A. Explanation of observation sheet for time study
B. Noting task elements
C. Symbols for shorthand recording (therbligs, etc.)
D. Calculations
E. Allowance factors—worker rating, etc.

NOTE: Trainees should be supplied with stop watches, observation sheets, and boards. A simple task should be performed by one trainee while another makes observations and records. Comparisons should be made after exercise is completed. Difficulties should be discussed.

TOPIC IV. INDUSTRIAL PSYCHOLOGY VIEWPOINTS

A. Range of psychological approach to human behavior in industry
B. Areas of criticism of time and motion economy
   1. Assumptions by industrial engineers and management
      a. Consistency of individual performances versus variability
      b. Atomistic visualization of human behavior —part versus whole
      c. Accounting for individual differences—age, skill, motivation, aptitude, etc.
      d. Criteria used for evaluation
      e. Methods of measurement
      f. Subjectivity factor in estimating and day-to-day variability of observer
      g. The theories of average, leveling, and rating
      h. Neglect of scientific approach
      i. Formation of principles and laws by time and motion economy engineers or technicians
      j. Fatigue allowances
      k. The best method fallacy
C. View of time and motion study as descriptive methods of investigating work
D. Work analysis by industrial psychologists
   1. Movement
   2. Work station arrangement
   3. Design of tools and equipment—human factors engineering
   4. Causes of worker fatigue and boredom
   5. Motivation research
   6. Effect on employee behavior
E. Areas of consolidation of industrial engineering and industrial psychology

TOPIC V. EMPLOYEE VIEWS ON TIME AND MOTION ECONOMY

A. Resistance to change
B. Source of initiation of change
C. Development of insecure feelings
D. Development of attitude toward supervisors

TOPIC VI. LABOR ORGANIZATION VIEWS ON TIME AND MOTION ECONOMY

A. Obtaining studies for use in collective bargaining
B. Objection to one standardized method of doing job
C. Possible loss of membership
D. Feeling of lack of objectivity of industrial time and motion studies

TOPIC VII. THE EMPLOYEE RELATIONS DEPARTMENT AND TIME AND MOTION ECONOMY

A. Concerns of employee relations department
   1. Employee morale and behavior
   2. Productivity of employees
   3. Reduction of absenteeism and turnover costs
   4. Collective bargaining
   5. Employee training
B. Reconciliation of differing points of view regarding time and motion economy by employee relations group
   1. Acting as mediator
   2. Consultations with production group
   3. Use of reconciled views in collective bargaining process
C. Training of workers in new methods
D. Gaining worker acceptance of new methods
   1. Adequate communication
   2. Periodic reviews and adjustments of time and motion economy practices
E. Use in wage and salary administration
F. Supervisory training required

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BARNES, R. M. *Motion and Time Study: Design and Measurement at Work, 5th ed.* New York: John Wiley and Sons, 1963.

———. *Motion and Time Study Problems and Projects, 2nd ed.* New York: John Wiley and Sons, 1961.

BLOOD, JEROME W. (ed.). *The Personnel Job in a Changing World.* New York: American Management Association, 1964.

CLOSE, G. C., JR. *Work Improvement.* New York: John Wiley and Sons, 1960.

GELLERMAN, S. W. *People, Problems, and Profits.* New York: McGraw-Hill, 1960.

GILMER, BEVERLY V. *Industrial Psychology.* New York: McGraw-Hill, 1961.

KARN, H. W. AND GILMER, BEVERLY V. *Readings in Industrial and Business Psychology, 2nd ed.* New York: McGraw-Hill, 1962.

QUICK, J. H.; DUNCAN, J. H.; AND MALCOLM, J. A. *Work Factor Time Standards.* New York: McGraw-Hill, 1962.

SCHAFFER, R. H. *Maximizing the Impact of Industrial Engineering.* New York: American Management Association, 1966.

SMITH, H. C. *Psychology of Industrial Behavior, 2nd ed.* New York: McGraw-Hill, 1964.

SPATES, T. G. *Human Values Where People Work.* New York: Harper and Row, 1960.

STALEY, JOHN D. *The Cost Minded Manager.* New York: American Management Association, 1961.

TIFFIN, J. AND MCCORMICK, E. J. *Industrial Psychology, 5th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

TRAFFIC MANAGEMENT (TM)

Functional Knowledge for: Branch Manager, Tariff and Schedules Examiner, Contract and Order Administrator

Hours Class: 2 hours daily

Total: 80 hours

Description and Teaching Suggestions

Control of an industry's incoming and outgoing materials and products is vital if production needs are to be maintained and customers' requirements are to be met. This control requires a capable staff, and an understanding of the clerical details involved in maintaining a steady flow of inbound production materials and an outbound flow of finished products or materials. Trainees will be introduced to the various kinds of knowledge required to enable them to perform the necessary clerical work. Teachers should instruct by leading the trainee through appropriate text material and by assigning problem material for home preparation. Home assignments should be graded, and problems should be reviewed in class. The assigned problem material should be based on actual business situations.

Where possible, trainees should be taken on two or more field trips to a company's shipping and receiving department and to a large carrier's terminal. These trips would enable the trainee to see, first hand, the need and application of the study program.

Teachers should also consult the Shipping Regulations and Procedures unit.

Standards of Achievement

1. Demonstrate knowledge of, purpose and use of, and ability to complete:
   a. Bill of lading
   b. Freight bill
   c. Carrier's delivery receipt
   d. REA receipt
2. Explain meaning of:
   a. F.O.B. origin, F.O.B. destination
   b. Prepaid, prepaid and charge, prepaid and allowed
3. Explain how loss and damage claims are handled:
   a. Time limit for filing
   b. When inspection report is needed and time limitation for requesting
   c. What determines who should file claims
4. Describe and be able to find specific information in the National Motor Freight Classification and Uniform Freight Classification.
5. List or explain a few basic rules contained in the National Motor and Uniform Freight Classifications.
6. Explain the application of the descriptions and ratings contained in the National Motor and Uniform Freight Classifications.
7. Know class rates, commodity rates, rates made by intermediate clause application, omnibus clause, and breakpoints.
8. Describe when the following modes of transportation are best used:
   a. Rail freight—LCL, CL
   b. Motor freight—LTL, TL
   c. REA, air express
   d. Freight forwarders
   e. Air freight, deferred air freight
   f. Air freight forwarders
   g. Parcel post
   h. United Parcel Service
9. Explain functions of Classification Committee—rail and motor and Standing Rate Committees
10. Explain four ways to reduce transportation costs.

Prerequisites for Study of Traffic Management

Trainee selection standards. Shipping Regulations and Procedures unit or equivalent work experience would be helpful.

Topic Outline

I. Transportation in the United States Before 1887
II. Federal and State Regulation
III. Traffic Management
IV. Classification of Freight
V. Construction of Tariffs
VI. Freight Rates
VII. Modes of Transportation
VIII. Shipping Documents
IX. F.O.B. Terms
X. Claims
XI. Ways to Reduce Transportation Costs

TOPIC I. TRANSPORTATION IN THE UNITED STATES BEFORE 1887

A. Local nature of transportation
   1. Manufacturing on small scale

2. Transportation needs were confined to nearby towns
3. Horse and wagon was adequate for needs
4. Charges were on basis of what the public would pay

B. Population growth increased industrial growth
   1. Need for expanding market
   2. Rivers—early routes of transportation
   3. Development of canals to connect lakes and rivers

C. Beginning of "Iron horse"
   1. Adjunct to canals
   2. Competitive with canals
   3. Growth of railroads and decline of canals

D. Conditions which led to regulation
   1. Competition between railroads
   2. Inability of canals to compete with railroads
   3. Prejudice and discrimination practiced by railroads—against each other, communities, and industries

TOPIC II. FEDERAL AND STATE REGULATION

A. Passage of "Act to Regulate Commerce" in 1887
   1. Original provisions
   2. Inadequacies of the act which reduced its effectiveness
   3. Congressional activity to make the act effective
      a. Amendment of section 6 in 1889 giving ICC authorization to prescribe form of tariffs
      b. Elkins Act—1903
      c. Hepburn Act—1906

B. State commissions
   1. Predated Federal regulation
   2. Not applicable to interstate commerce

TOPIC III. TRAFFIC MANAGEMENT

A. Securing desired transportation at lowest costs in relation to required services
B. Instruct sales and purchasing departments in meaning of F.O.B. terms
C. Cooperating with other departments in:
   1. Production planning
   2. Plant locations
   3. Furnishing rate information to sales and purchasing departments
   4. Helping determine desirable units of sale and purchase
   5. Assisting or arranging travel details for executives
D. Managing automobile fleet for sales and service personnel
E. Maintaining good working relations with common carriers
F. Receiving function
G. Shipping function
H. Maintaining traffic flow
I. Preparing shipping orders and related documents
J. Providing insurance
K. Role of the traffic manager

TOPIC IV. CLASSIFICATION OF FREIGHT

A. Early history of classification
   1. Numerous individual carrier classifications
   2. Lack of uniformity

B. Rail classification
   1. Territoriès
   2. Rules
   3. Commodity descriptions
   4. Ratings

C. Motor classification
   1. Territories
   2. Rules
   3. Commodity descriptions
   4. Ratings

D. Procedure for handling applications with classification boards
E. Miscellaneous classifications and regulations

TOPIC V. CONSTRUCTION OF TARIFFS

A. Tariff circulars
   1. Regulations governing form and content
   2. Develop uniformity and clarity

B. Contents of tariffs
   1. Title page
   2. Arrangement of contents
   3. Supplements
      a. Amendments to tariffs
      b. Title page and arrangement of contents identical to tariffs

TOPIC VI. FREIGHT RATES

A. Class rates
   1. Apply to ratings shown in classifications
   2. Published for all areas in United States

B. Commodity rates
   1. Apply to specific commodities
   2. Apply in preference to class rates except under certain circumstances
   3. Usually lower than class rates

C. Special service charges or rates
D. Auditing freight charges
   1. By industry rate clerks
   2. By outside auditing firm

TOPIC VII. MODES OF TRANSPORTATION

A. Rail freight
B. Motor freight (national and local carriers)
C. REA, air express
D. Freight forwarders
E. Air freight, deferred air freight
F. Air freight forwarders
G. Parcel post
H. United Parcel Service
I. Steamship (national and overseas)

TOPIC VIII. SHIPPING DOCUMENTS

A. Bills of lading
   1. Description
   2. Purpose and use
B. REA receipts
   1. Description
   2. Purpose and use
C. Freight bills
   1. Description
   2. Purpose and use
D. Carrier delivery receipts
   1. Description
   2. Purpose and use

NOTE: The teacher should obtain, if available, copies of actual shipping documents for use in class discussion and for trainee practice in completion based on a case history.

TOPIC IX. F.O.B. TERMS

A. Meanings commonly used
   1. Denotes when title passes
   2. Origin or shipping point
   3. Destination
B. Variations of items A (2) and A (3) in relation to payment of freight charges
   1. Collect
   2. Collect and allowed
   3. Prepaid
   4. Prepaid and allowed
C. Determine who should file loss and damage claims

TOPIC X. CLAIMS

A. Overcharge
   1. Time limitation for filing
   2. Reasons for overcharge
      a. Wrong rate
      b. Error in description, extension, and/or weight
   3. Claim forms
B. Loss and damage
   1. Time limitation for filing
   2. Inspection if concealed damage
   3. Carrier's delivery receipt must acknowledge visible damage with delivery man's signature
   4. Determination of extent of loss
      a. Invoice value
      b. Replacement cost
      c. Repaid cost
   5. Loss and damage claim forms
   6. Papers required to verify loss

NOTE: Teacher should have sample claim forms available for practice exercises.

TOPIC XI. WAYS TO REDUCE TRANSPORTATION COSTS

A. Choosing most economical mode of transportation in relation to service desired
B. Packing adequate, but not excessive
C. Shipping in large quantities for weight reduction rates
D. Not shipping in weights less than required to equal or exceed minimum charges
E. Consolidating shipments
F. Choosing and using containers and/or pallets to secure lower transportation charges
G. Choosing pool car or pool truck shipping where possible—also stopoffs

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BRYON, LESLIE A. *Traffic Management in Industry.* New York: Holt, Rinehart, and Winston, Inc., 1953.

COLLEGE OF ADVANCED TRAFFIC, *Transportation and Traffic Management.* Chicago: College of Advanced Traffic. Associated project materials.

FLOOD, KENNETH U. *Traffic Management.* Dubuque, Iowa: Wm. C. Brown Co., 1963.

INTERNATIONAL CORRESPONDENCE SCHOOLS. *Traffic Management.* Scranton, Pa.: International Correspondence Schools.

INTERSTATE COMMERCE COMMISSION. *The Interstate Commerce Act.* Washington: U.S. Government Printing Office, 1964.

LASALLE EXTENSION UNIVERSITY. *Traffic Management.* Chicago: LaSalle Extension University, Associated project materials.

MORTON, NEWTON AND MOSSMAN, FRANK H. *Principles of Transportation.* New York: Ronald Press, 1957.

TAFF, CHARLES A. *Management of Traffic and Physical Distribution, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1964.

WILSON, G. L. *Traffic Management: Industrial, Commercial, Governmental.* Englewood Cliffs, N.J.: Prentice-Hall, 1956.

See also Texts and Other Teaching Materials in Shipping Regulations and Procedures unit.

UNION CONTRACT ADMINISTRATION (UCA)

Environmental and Functional Knowledge for: Branch Manager, General Foreman, Industrial Organization Manager

Hours Class: 1 hour daily

Total: 60 hours

Description and Teaching Suggestions

This unit is designed to help trainees who may be directly involved in dealing with employers and employee representatives in a labor organization to understand labor agreements in general. Application of this knowledge in the work setting will be largely influenced by the labor agreement in effect.

The unit begins with an overview of what a labor agreement represents to the worker, and management's obligations and duties under the agreement. The position of the supervisor, his relationships with the unionized work force, and the scope of his actions as a management representative is explored.

Teachers of this unit should use group discussion, role plays a typical "firing line" situations involving union-management relations and special readings in labor relations. Trainees should write reports on the material read. In addition, teachers should have copies of typical arbitration cases and decisions for distribution to and for discussion by the group. Evaluation of trainee knowledge should be made by objective tests.

Standards of Achievement

1. Know the principle provisions of labor agreements.
2. Describe typical grievance procedures.
3. Know supervisor's responsibilities and duties regarding labor agreement administration.

Prerequisites for Study of Union Contract Administration

Trainee selection standards.

Topic Outline

I. Collective Bargaining
II. The Labor Agreement in General
III. Labor Agreement Specifics
IV. Supervisory Role in the Administration of the Agreement
V. Grievance Procedure and the Supervisor
VI. The Supervisor and Collective Bargaining

TOPIC I. COLLECTIVE BARGAINING

A. Origins of modern-day collective bargaining
B. Collective bargaining process
   1. Presentation of demands by labor organization
   2. Certification of labor organization as bargaining agent
   3. Legal requirements of restrictions on:
      a. Employer
      b. Bargaining agent
   4. Multiple bargaining participants
C. Obligation to bargain
   1. In good faith
   2. Other approaches—Boulwarism, etc.
D. Obligation to reduce bargaining agreements and understandings to writing
E. Public relations during bargaining process
F. Difference between contract and agreement

TOPIC II. THE LABOR AGREEMENT IN GENERAL

A. The agreement and the employee
   1. The employee's contract with the employer
      a. Nature
      b. Termination
   2. The influence of the labor agreement on the employee's contract with the employer
      a. Influence on wages, hours, and working conditions
      b. Protection of the employee against certain conditions
B. The labor agreement and company policy
   1. Agreement is company policy in areas that it encompasses
   2. Management's prerogatives
   3. Adherence by the company and supervision to terms of agreement
   4. Need for careful study of provisions of specific agreement
C. The agreement as a form of recognition and security for the union and the individual
   1. Description of employees included in bargaining unit
   2. Form of recognition
      a. As bargaining agent
      b. Closed shop definition

c. Union shop definition
d. Checkoff
e. Others

3. Duration of agreement
4. Individual security

D. Definition of wages
1. Types of plans for wage payment
2. Uniformity of wages
3. Wage rate range
4. Fringe benefits as part of wage structure
5. Guaranteed annual wage plans
6. Provision for extra hours of work

E. Hours of work
1. Definition in agreement
2. Effect on total income of employee
3. Provisions for overtime, shift differential, holiday, vacation, or other premium payments

F. Working conditions
1. Vagueness of definition in agreements
2. Employer knowledge and philosophy of human relations

NOTE: The teacher should have available some typical labor agreements for study by trainees showing how provisions are categorized. These may be used for discussion of the next topic.

TOPIC III. LABOR AGREEMENT SPECIFICS

NOTE: Major provision of typical agreements are covered by the subtopics below. In the time available, the teacher may expand them as required.

A. Seniority
1. Types
a. Plantwide
b. Departmental
c. Roster
d. Job families or job
e. Combinations of (a), (b), (c), and/or (d)
2. Test of ability to do work—may be common to all types
3. Advantages and disadvantages to company and union
4. Seniority and layoffs
a. Order of use for layoff
b. Period of retention after layoff
c. Reinstatement provisions
5. Seniority and promotions
a. Trial period
b. Judgment of success or failure of employee
c. Disposition of employee who fails trial period
d. Promotion of individual beyond ranks, and seniority retention problem
e. Effect of tests or other criteria for promotion on seniority
f. Specific definitions in seniority-based promotion clauses; i.e., "All other things being equal, seniority shall govern in promotions." Problem of defining "other things"
g. Kind of seniority governing promotion
h. Involvement of bargaining agent with promotion from ranks to supervision to preserve effectiveness of seniority
i. Effect of past performance, conduct, and disciplinary record on right of promotion by seniority
6. Seniority accumulation during nonwork periods or absence from ranks
a. Illnesses—sporadic
b. Sick leave, maternity leave
c. Leaves of absence—union business, personal business, renewals, jury duty
d. Service in Armed Forces—draft, voluntary enlistment, reserves, voluntary reenlistment after original draft, Merchant Marine service, etc.
e. Purposes of seniority accumulation
(1) Layoffs
(2) Promotions
(3) Vacation entitlement
(4) Pension rights
f. Accumulation and/or retention of seniority for those promoted out of bargaining unit
7. Super-seniority—union officials
a. Purpose—protection of union structure, not reward for official
b. Applicability to promotions

B. Transfer
1. Temporary (time limit)
2. Permanent
3. At company convenience
4. At convenience of employee
5. Rights of other employees to fill vacancy created by items 1 through 4
6. Rights to a lateral transfer not involving promotion

C. Hours of work and pay
1. Delineation of shift hours
2. Management right to change shift hours if production requires
3. Uniform versus local plant hours
4. Credited hours
5. Productive hours
6. Reduction or increases in rate per hour

D. Overtime and premium pay
   1. Specification of entitlement
   2. Equalization overtime provision
   3. Compulsory reasonable amount of overtime unless stated to the contrary
   4. Rate of pay for holiday work
   5. Work on Saturdays and Sundays, irrespective of 40-hour rule
   6. Prevention of pyramiding
   7. Eight-hour rule per day and 40-hour rule per week
   8. Specification of start of overtime
   9. Avoidance of automatic overtime
   10. Call-backs
      a. Minimum guaranty
      b. Distinguished from regular overtime
      c. Test of having left company property

E. Holidays
   1. List of holidays
   2. Rate of pay for incentive and regular employees
   3. Effect of holiday falling on Saturday or Sunday
   4. Prerequisite for holiday—in terms of service, hours of work in current year, work day before or after, etc.
   5. Entitlement of probationary employees, employees on sick leave, laid-off employees

F. Probationary employees clause
   1. Specification of duration of probationary period
   2. Distinction between probationary and trial period
   3. Rights of a probationary employee
      a. Entitlement
      b. Benefits under grievance procedure
      c. Legal causes for discharge

G. Discipline clause
   1. "Just cause" provisions
   2. Problems concerning specification of punishment for each offense and/or reoccurrence

H. Visitation of outside union officials

I. Grievance procedure (covered in topic V)

J. Other provisions
   1. Retirement, pensions, health insurance, etc.
   2. Severance pay
   3. Jury duty provisions
   4. Bidding for jobs
   5. Training
   6. Special provisions of contracts

TOPIC IV. SUPERVISORY ROLE IN ADMINISTRATION OF THE AGREEMENT

A. Importance of relationship of union representatives and supervision

B. Responsibilities of supervision to higher management

C. Training of supervisory personnel involved with administration of agreement—conduct and involvement in grievances

D. Company's prerogative to establish rules and regulations
   1. For conduct of business
   2. Not in violation of specific provisions of agreement

E. Obeying of supervisory orders by employees before grieving
   1. Exception when order may violate law
   2. Exception when order endangers health and safety of employee or others

F. Progressive discipline
   1. "Just cause"
      a. As related to offense
      b. As related to offender's record
   2. Types of discipline for infractions
      a. Oral and written
      b. Suspension
      c. Discharge
   3. Union's right to protest company action affecting current or future security of employee

G. Supervisor's handling of specific problems
   1. Disciplinary
      a. Absences and latenesses
      b. Insubordination
      c. Unfit conditions-to-work complaints
      d. Fighting
      e. Refusal by employee to work overtime or on holidays, Saturdays, or Sundays
      f. Carelessness causing rejected work, damaged equipment, and/or excessive scrap
      g. Being struck by employee
      h. Unbecoming language used by employees
      i. Off-premises conduct problems
      j. Others
   2. Contractual
      a. Granting overtime to wrong employee
      b. Improper layoff or recall from layoff
      c. Failure to promote
      d. Improper pay and length of retroactivity
      e. Other contractual problems

3. Other problems
   a. Inability of employee to perform assigned work in classification
   b. Absences or latenesses due to physical condition
   c. Personal matters interfering with work--garnishments, law suits, etc.
   d. Moonlighting
   e. Part time work for a competitor
   f. Other specific problems

NOTE: Examples of the above problems should be given to group for study.

H. Role in grievance procedure and its importance to management (detailed in topic V)

TOPIC V. GRIEVANCE PROCEDURE AND THE SUPERVISOR

A. The grievance procedure clause in the agreement
B. Grievance and arbitration procedure specifics
   1. Step procedure
      a. Reducing grievance to writing
      b. Formal answer to written grievance
   2. Time limits on both parties at each step
      a. Effect of violation of time limits
         (1) Barred if by grieving party
         (2) Automatic progression to next step if by accused party
      b. Realistic time limits
   3. Right of management to grieve
   4. Arbitration
      a. Selection of arbitrator
      b. Use of Federal Mediation and Conciliation Service
      c. Use of State services
      d. Use of American Arbitration Association
      e. U.S. Supreme Court on jurisdiction of arbitrator
      f. Limitations of arbitrator
         (1) To contract interpretation decisions
         (2) On decisions for new contract
      g. Effect of arbitration award
      h. Appeals to courts of arbitrator's decision
C. Shop committees
   1. Number in relation to size of plant
   2. Rights of committee members
   3. Duties of committee members
      a. Subject to employer rules
      b. Procedure for leaving own department and for entering another
      c. Rights to speak to other employees—conditions
      d. Committee members have obligation to observe contract
   6. Rights of chairman of committee
   7. Union time investigating grievances
      a. All time
      b. Specified number of hours per man
   8. Grievance meeting time for committee
   9. Arbitration time
D. Supervisor's handling of grievances
   1. May indicate errors by supervisor
   2. Indicate degree of closeness, confidence, and relationships of supervisor with employees
   3. Reporting to industrial relations manager
      a. Seeking advice and counsel
      b. Knowledge of procedure
   4. Reporting to supervisor's manager
   5. Recording grievance and action
   6. Importance of documentation in all phases of grievance handling
   7. Submitting decision to responsible organization personnel
   8. Awareness of grievance creating conditions and actions thereon
   9. Supervisor's role in arbitration proceedings as witness or decision maker
   10. Maintaining relations with shop steward

TOPIC VI. THE SUPERVISOR AND COLLECTIVE BARGAINING

A. Documentation of certain actions related to labor agreement
B. Supplying recommendations to management for collective bargaining
C. Establishing of organization precedent through actions

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

A.F. OF L.—C.I.O. *The Shop Steward Manual.* Washington: American Federation of Labor—Congress of Industrial Organization.

CHAMBERLAIN, NEIL W. AND KUHN, JAMES W. *Collective Bargaining, 2nd ed.* New York: McGraw-Hill, 1965.

HENDERSON, J. A.; HINTZ, E. R.; JARRETT, J. V.; MARBUT, R. G.; AND WHITE, W. J. *Creative Collective Bargaining: Meeting Today's Challenges to Labor-Management Relations.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

PLATT, ROBERT AND WEISS, DENA G. *Collective Bargaining Clauses.* Washington: Division of Wages and Industrial Re-

lations, Bureau of Labor Statistics, U.S. Department of Labor, 1965–67.

RESEARCH INSTITUTE OF AMERICA. *ProtectingManagement's Rights Under a Union Contract*. New York: Research Institute of America, 1959.

SCHULTZ, G. P. AND COLEMAN, J. R. *Labor Problems, 2nd ed.* New York: McGraw-Hill, 1959.

SELEKMAN, B. M.; FULLER, S. H.; KENNEDY, T.; AND BAITSELL, J. M. *Problems in Labor Relations, 3rd ed.* New York: McGraw-Hill, 1964.

STESSIN, LAWRENCE. *Employee Discipline*. Washington: Bureau of National Affairs, 1960.

STEVENS, CARL M. *Strategy and Collective Bargaining Negotiation*. New York: McGraw-Hill, 1963.

STONE, MORRIS. *Labor Grievances and Decisions*. New York: Harper and Row, 1965.

———. *Labor-Management Contracts at Work*. New York: Harper and Row, 1961.

———. *Managerial Freedom and Job Security*. New York: Harper and Row, 1964.

STRAUSS, GEORGE AND SAYLER, LEONARD. *Personnel: The Human Problems of Management, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

TORRENCE, GEORGE W. *Management's Right to Manage*. Washington: Bureau of National Affairs, 1959.

UNIVERSITY OF CHICAGO, GRADUATE SCHOOL OF BUSINESS. *The Structure of Collective Bargaining*. New York: Free Press of Glencoe, 1961.

WALTON, R. E. AND MCKERSIE, R. B. *A Behavioral Theory of Labor Negotiations*. New York: McGraw-Hill, 1965.

WERNE, BENJAMIN. *Administration of the Labor Contract*. Mundelein, Ill.: Callaghan, 1963.

WAGE AND SALARY ADMINISTRATION (WSA)

Basic Knowledge for: Office Manager, Chief Clerk, Administrative Assistant, Branch Manager, Operations Officer, General Foreman, Industrial Organization Manager

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 60 hours

Description and Teaching Suggestions

This unit starts with a general introduction to the field of wage and salary administration. Trainees will learn what should be included in the basic objectives of any sound wage or salary administration program. In addition, they will discover the critical importance of such objectives in properly motivating employees to achieve their most effective performance. They will also learn the relationship between the motivation of employees and the amount of compensation paid, as well as the form in which it may be paid.

The close interrelationship between compensating employees properly and accurate job descriptions and evaluations will be reviewed. There will also be a discussion of the great difficulty of measuring precisely the individual contribution of each employee. A number of the factors which affect an organization's decisions in determining its compensation policy will be reviewed.

Training techniques to be used in this course should include lectures regarding the historical methods of handling the compensation of employees, descriptions of how various nonincentive and incentive plans operate, and discussions on the development of pay plans.

A number of class discussions will be led by the teacher to provide an opportunity for trainees to develop their skills in preparing the various elements of a pay structure. Trainees will be provided the experience of translating job evaluation points into dollars, grouping of point-values, and constructing a scattergram.

It is important that the teacher use case examples to provide trainees with experience in developing pay range midpoints and range quartiles, and calculating range minimums and maximums.

To gain experience in conducting a wage or salary survey, the class should be divided into work teams of five or six people. After selection of the key jobs to be surveyed, one team may visit another to conduct a simulated job survey.

Standards of Achievement

1. Know fundamentals and use of various incentive and nonincentive plans.
2. Develop a pay range to meet organization requirements.
3. Conduct a wage or salary survey.
4. Demonstrate knowledge of how to administer a salary merit increase program.
5. Demonstrate knowledge of how to administer other than merit elements of salary programs.
6. Know supplemental compensation plans.

Prerequisites for Study of Wage and Salary Administration

Trainee selection standards.

Topic Outline

I. History and Objectives of Wage and Salary Administration
II. Developing an Organization's Compensation Policies
III. Basic Wage Plans
IV. Major Problems of Wage and Salary Administration
V. Development of Pay Structures into Payroll Dollars
VI. Developing Pay Ranges
VII. Conducting the Wage or Salary Survey
VIII. Salary Merit Administration
IX. Administration of Other Than Salary Merit Increases
X. Types of Supplemental Compensation
XI. Special Problems of Salary Administration
XII. Practice in Developing Wage and Salary Survey Forms
XIII. Practice in Developing Wage and Salary Scales
XIV. Practice in Writing a Report on Wage and Salary Administration

TOPIC I. HISTORY AND OBJECTIVES OF WAGE AND SALARY ADMINISTRATION

A. Definition of wage and salary administration
B. Historical background
C. Basic objectives of any program
D. Money and motivation
E. Relationship to job descriptions and job evaluation

TOPIC II. DEVELOPING AN ORGANIZATION'S COMPENSATION POLICIES

A. Difficulty of measuring exact employee contribution
B. Factors of compensation
   1. Time spent at work
   2. Energy expanded—physical, mental, emotional
   3. Team effort and cooperation with others
   4. Productivity
C. Ability to pay
D. Effects of cost of living—national and local indexes
E. Legislative requirements—public contract, minimum wage, fair labor standards
F. Impact of union organization
G. Availability of and competition for labor

TOPIC III. BASIC WAGE PLANS

A. Nonincentive plan
B. Incentive plan
   1. At a decreasing rate
   2. Proportionately
   3. At an increasing rate
C. Tests of wage plan
   1. Easily understood
   2. Easily computed
   3. Earnings related to effort
   4. Incentive earnings paid promptly after being earned
   5. Incentive plans relatively stable and unvarying
D. Effects of union activities
   1. Lump of work theory
   2. Equality of worker theory
   3. Union strategy in use of wages

TOPIC IV. MAJOR PROBLEMS OF WAGE AND SALARY ADMINISTRATION

A. Intralocation inequities
B. Interlocation inequities
C. Job differentials
D. Merit differentials
E. Seniority differentials
F. Obtaining employee understanding
G. Dynamics of economy

TOPIC V. DEVELOPMENT OF PAY STRUCTURES INTO PAYROLL DOLLARS

A. Translating job evaluation scales into dollars
B. Establishing relationship of job values
C. Logic of grouping job values
   1. Administrative reasons
   2. Practical considerations
D. Techniques of grouping
   1. Application of Weber's Law
   2. Practical considerations
E. Constructing a scattergram
F. Developing the best-fit wage curve from scattergram analysis

TOPIC VI. DEVELOPING PAY RANGES

A. Requirements of the particular business
B. Salary range as an opportunity range
C. Calculating minimums and maximums—floors, ceilings
D. Red-line jobs
E. Establishment of range quartiles defined according to level of performance

F. Pay range midpoints
G. Standard within-grade progressions—steps

TOPIC VII. CONDUCTING THE WAGE OR SALARY SURVEY

A. Purposes for conducting survey
B. Selecting jobs to be surveyed
   1. Requirements for key jobs—benchmark jobs
   2. Describing key jobs for survey purposes
C. Selecting organizations to be surveyed
   1. Product competitors
   2. Labor market competitors
   3. Non-competitive organizations
D. Analysis of information
   1. Comparison of base rates
   2. Inclusion of supplemental or fringe benefits costs
      a. Paid vacations and holidays
      b. Paid sick leave
      c. Paid insurance
      d. Matched savings plans
      e. Prorated cost of other employee benefits

NOTE: See also topic X in this unit. Supplemental fringe benefit details should be sought in the wage and salary survey.

E. Reporting survey data to management
   1. Weighted presentations
   2. Organization—average presentation
   3. Organization-by-organization comparisons
   4. Summaries and conclusions for managment

TOPIC VIII. SALARY MERIT ADMINISTRATION

A. Salary planning approach
B. Informal approach
C. Bases for granting merit increases
   1. Performance in the recent past
   2. Present salary and past salary treatment
   3. Years of service in a position
   4. Expectation of future potential (occasionally)
   5. Other factors
D. Salary review cycles
E. Salary increase budgets
F. Salary submission and approval cycles

TOPIC IX. ADMINISTRATION OF OTHER THAN SALARY MERIT INCREASES

A. General increases
B. Cost-of-living increases
C. Promotional increases
D. Green-circle and red-circle rates
E. Transfers
F. Upgradings and downgradings
G. Demotion

TOPIC X. TYPES OF SUPPLEMENTAL COMPENSATION

A. Sales bonus plans
B. Employee savings plans
C. Employee stock purchase plans
D. Incentive compensation plans
E. Stock option plans
F. Deferred compensation plans
G. Paid holidays, vacations, insurance, sick leave, and other benefits

TOPIC XI. SPECIAL PROBLEMS OF SALARY ADMINISTRATION

A. Periodic adjustment of the pay structure
B. Across-the-board increases versus individual increases
C. Employees who have reached the top of the pay range
D. Pay increases for long-service employees

TOPIC XII. PRACTICE IN DEVELOPING WAGE AND SALARY SURVEY FORMS

TOPIC XIII. PRACTICE IN DEVELOPING WAGE AND SALARY SCALES

NOTE: Raw data such as job descriptions, job evaluations, out-of-line jobs, and wage surveys should be given to the trainees for practice.

TOPIC XIV. PRACTICE IN WRITING A REPORT ON WAGE AND SALARY ADMINISTRATION

Texts and Other Teaching Materials

Texts and materials listed for the unit, "Job Descriptions, Specifications, and Evaluation," and appendix D are applicable to this unit.

WORK SIMPLIFICATION (WS)

Functional Knowledge for: Bank Cashier, Chief Clerk, File Service Worker, Junior Executive, Office Manager, Trainee Manager, Administrative Assistant, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, Clerical Technician, Process-Description Writer, Purchase-Price Analyst

Hours Class: 1 hour daily: Laboratory: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

This unit will provide a working knowledge of the principles of work measurement and work simplification. Trainees should develop an appreciation for the necessity to measure actual time required for various tasks accurately. This will enable trainees to study changes in processes which will permit savings in time required for various operations and reduce worker fatigue. Such studies are essential in the determination of the advantages of new processes, materials, and equipments.

The primary concern of this unit is with principles involved in the study of work methods and habits, and the methods of exploring possible improvements. However, such study of principles cannot proceed effectively without knowledge of the tools that can be used to simplify work. The laboratory periods will be devoted to basic instruction and practice in the use of various techniques and appropriate equipment. The purpose of the unit is not necessarily to make the trainee expert in the use of equipment, but rather to help him understand the capabilities and limitations of the equipment to be employed in given situations.

Standards of Achievement

1. Demonstrate ability to recognize necessity of time measurement without dependence upon emotional responses.
2. Recognize contributions of Taylor, Gilbreth, and other developers of the science of work simplification.
3. Recognize that the study of work methods is a science independent of basically human, labor, or government attitudes.
4. Demonstrate an understanding of the techniques of work measurement and work simplification, and their fundamental purposes and intended results.
5. Know how work simplification contributes to a successful industrial economy through job upgrading, reduced hours of work, industrial efficiency, and better wages.

Prerequisite for Study of Work Simplification

One year of industrial experience or a basic unit such as Business Principles and Organization.

Topic Outline

I. History of Work Measurement and Work Simplification
II. Methods of Work Simplification
III. Benefits of Work Simplification

TOPIC I. HISTORY OF WORK MEASUREMENT AND WORK SIMPLIFICATION

A. Contributions of Taylor and others
   1. Taylor's determination of work measurement from point of view of human labor or materials involved
   2. Development of work measurement philosophy through the questioning approach
      a. How much does a worker do in terms of materials handled?
      b. How much time does a worker spend in preparing for work to be done?
      c. Who has determined the most effective work load? On what basis and with what measurements?
   3. Development of observation and timing techniques—weighting and other quantitative measurements of output
B. Contributions of Gilbreth and others
   1. Use of motion picture techniques
   2. Analysis of motions as well as time for motions
   3. Analysis of workplace design and environment
C. Human engineering
   1. Analysis of human percepts
   2. Design of workplace and work environment to guarantee maximum ability to cope with work required

TOPIC II. METHODS OF WORK SIMPLIFICATION

A. Flow process chart
   1. Philosophy of the flow process chart

2. Use of the flow process chart
   a. Questions that should be asked
      (1) What is being done?
      (2) Why is it being done?
      (3) Where is it being done?
      (4) When is it being done?
      (5) Who is doing it?
   b. Investigations that should be made
      (1) What can be eliminated?
      (2) What can be simplified?
      (3) What can be combined?
      (4) What sequence can be changed?

B. The flow process diagram and its uses

C. Utilization of results of flow process chart analysis
   1. Comparison of labor savings against material and capital costs
   2. Impact of changes on labor force—quality and quantity of work
   3. Union contract considerations

D. Use of stopwatch techniques
   1. Simplicity and low cost of stopwatch equipment
   2. Limitations on use of stopwatch equipment
   3. Lack of permanent retrievable records
   4. Human error

E. Use of camera and micromotion and macromotion studies
   1. Cost of equipment and supplies
   2. Cost of labor in evaluating data secured
   3. Advantage of permanent record
   4. Discussion of equipment needed for successful camera usage

TOPIC III. BENEFITS OF WORK SIMPLIFICATION

A. Saving in labor
   1. Less manhours required for task
   2. Reduction in total wages paid

B. Saving in worker fatigue
   1. Worker is less tired
   2. Worker is more efficient

C. Improvement in service

D. Social benefits
   1. Reduced working hours
   2. Higher wages
   3. Opportunity for time to secure more education
   4. Increased recreation time
   5. General increase in the standard of living

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BAILEY, G. B. AND PRESGRAVE, R. *Basic Motion Timestudy.* New York: McGraw-Hill, 1958.

BARNES, R. M. *Motion and Time Study Problems and Projects, 2nd ed.* New York: John Wiley and Sons, 1961.

———. *Motion and Time Study: Design and Measurement of Work, 6th ed.* New York: John Wiley and Sons, 1968.

CARROLL, P. *Timestudy Fundamentals for Foreman, 3rd ed.* New York: McGraw-Hill, 1954.

———. *Timestudy for Cost Control, 3rd ed.* New York: McGraw-Hill, 1954.

CLOSE, G. C. JR. *Work Improvement.* New York: John Wiley and Sons, 1960.

CORNELL, W. B. AND MADEHEIM, H. *Organization and Management in Industry and Business, 4th ed.* New York: Ronald Press, 1958.

LEHRER, R. N. *Work Simplification.* Englewood Cliffs, N.J.: Prentice-Hall, 1957.

MUNDEL, M. E. *Motion and Time Study: Principles and Practices, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

NADLER, G. *Motion and Time Study.* New York: McGraw-Hill, 1955. Student workbook.

———. *Work Simplification.* New York: McGraw-Hill, 1957.

QUICK, J. H.; DUNCAN, J. H.; AND MALCOLM, J. A. *Work-Factor Time Standards.* New York: McGraw-Hill, 1962.

ADMINISTRATIVE OFFICE EDUCATION UNITS

Administrative office education units are studies designed primarily for those trainees assuming supervisory duties in the field. These units of study are useful for trainees seeking positions of greater responsibility in their occupations, and for refreshing and upgrading skills of trainees presently employed in supervisory or managerial capacities.

Some of the units are in an occupational specialization such as employee training, public and community relations, marketing and advertising, or manpower planning. All have elements of management and administration incorporated, indicating that the enrollee in the unit will be responsible for the direction of other employees.

BASIC TRAINING METHODS AND PRACTICES (BTM)

Basic Skill for: Chief Clerk, Clerical Technician, File Service Worker, Insurance Office Manager, Office Manager, Safe Deposits Manager, Administrative Assistant, Branch Manager, Operations Officer, Credit and Collection Manager, Credit Union Supervisor, Junior Executive, Trainee Manager, Procurement Services Supervisor, General Foreman

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 70 hours

Description and Teaching Suggestions

This unit is designed primarily for trainees whose career objectives lie in the field of administration. Line or staff supervisors charged with the ultimate responsibility for training of personnel assigned to them can elect this unit for more intensive development of training skills started in the Principles of Effective Supervision unit.

Trainees will be introduced to the concepts and principles of learning and training as used in business and industry and will apply these in specialized, directed experience projects. Skills to be gained include analyzing training needs, preparing a job breakdown for training, scheduling training, selecting training aids and devices, conducting group training, preparing training reports, functioning in directed-discussion and group-centered conferences, and evaluating training. Knowledge of teaching methods and the practice and use of modern teaching techniques should also be explored.

Teachers should present concepts in guided classroom discussion with as much participation as feasible. Work-class experience and work-oriented projects should become the basis for continuing class discussion. Small groups of trainees should devote solid blocks of time to skill development. Preset and carefully directed field trips (or simulation experiences) should be planned by the teacher.

Because of trainee background variations, it will be necessary for the instructor to learn about the background and makeup of his particular group so that he can prepare visual aids and materials to fit each class situation. The job analysis approach to the learning situation should be stressed in all activities. Trainees should be encouraged to bring to class illustrative materials and cases that they may have from their previous work experience.

Evaluation of effectiveness of learning experiences should be overt and continuing and should include:

1. Teacher review and analysis of written projects (i.e., job breakdowns, training schedules)
2. Teacher and group analysis of classroom work
3. Teacher review of guide sheets and summaries for all field projects
4. Assigned book reviews to each trainee, analyzed by teacher and group, and then circulated to the group
5. Individual interview with teacher and guidance counselor to assess progress toward career objective

Standards of Achievement

1. Know basic learning processes.
2. Develop an appropriate course of instruction.
3. Conduct group training effectively.
4. Select training methods, aids, and devices to meet needs of trainees.
5. Demonstrate knowledge of how to schedule training to promote learning.
6. Write clear and accurate reports of training activities
7. Meet and deal with others in work-oriented, small-group activities.

Prerequisites for Study of Basic Training Methods and Practices

Trainee selection standards.

Prior work experience of at least 6 months in a supervisory capacity or in the personnel field would be helpful.

Topic Outline

I. Basic Relationships, Definitions, and Concepts
II. Types of Training Programs
III. Continuous Training in an Organization
IV. Training Staff
V. Training Methods
VI. Determining Training Needs
VII. Job Instruction Training Methods
VIII. Teaching and Coordinating
IX. Job Instruction Training Practice
X. Conference Leadership Training and Practice
XI. Supplemental Activities
XII. Evaluating Training Results
XIII. Furthering Training Career Objectives

TOPIC I. BASIC RELATIONSHIPS, DEFINITIONS, AND CONCEPTS

A. Need for and value of training
B. Ultimate responsibility for training and management (production, marketing, and administrative)
C. Personnel and training
D. Costs and value of training
E. Basic definitions
   1. Knowledge and understanding
   2. Skill and ability
   3. Interest and motivation
   4. Training and planned change
F. Teaching and learning
   1. The differences between knowing and teaching
   2. Learning from the learner's viewpoint
   3. The learning process as the vehicle for teaching
   4. Factors affecting learning
      a. Whole and part learning processes
      b. Meaningfulness of material
      c. Age factors
      d. Retention, recall, and performance
      e. Concept of forgetting
      f. Learning plateaus
      g. Principles and application of rewards and punishment
      h. Effect of frustration
      i. Individual differences—aptitudes, interest, intelligence, etc.
      j. Manual skills versus verbal learning
      k. Effects of fatigue, motivation, and maturation
      l. Effect of participation and personal involvement

TOPIC II. TYPES OF TRAINING PROGRAMS

A. Orientation and induction
B. Basic job training
   1. At the work location
      a. Apprentice type
      b. On-the-job
      c. Assistant-to positions
      d. Guided experience
      e. Coaching
   2. Away from the work location
      a. Vestibule
      b. Classroom
      c. Program of learning methods
      d. Correspondence
      e. Simulated work experience training
C. Supervisory, management, and executive development training
D. Professional and technical training
E. Educational and developmental programs
   1. In-house
   2. At colleges, universities, or special schools
   3. By outside consultants
   4. Trade associations
F. Special purpose training
   1. Company organization, policies, and procedures
   2. Safety, sales, accounting, etc.
   3. Human relations training
   4. Instructor training
G. Job, functional duties, and concepts training
H. Refresher training program

TOPIC III. CONTINUOUS TRAINING IN AN ORGANIZATION

A. Need for continuous training in an organization
B. Scheduled training for different groups of employees
C. Periodic and aperiodic training
D. Providing training on an "as needed" basis

TOPIC IV. TRAINING STAFF

A. Qualifications of instructors
   1. Motivation
   2. Aptitude, interest, and intelligence
   3. Experience
      a. Subject area
      b. Teaching or training
   4. Perceptivity, self-awareness, and sensitivity
   5. Ability to communicate clearly
   6. Education
      a. Formal
      b. Informal
      c. Courses in training or teaching
   7. Ability to relate to people effectively
B. Training of instructors
   1. Initial
   2. Continuous
C. Responsibilities and duties of instructors
   1. Preparing or obtaining of training aids, materials, and equipment
   2. Actual training functions
   3. Providing for facilities
   4. Evaluating training in conjunction with supervision and management

TOPIC V. TRAINING METHODS

A. Man-to-man
   1. Job instruction training method
   2. On-the-job coaching
   3. Directed experience
   4. Assistant-to positions
   5. Counseling
   6. Buddy system, sponsor, and others
B. Group training
   1. Directed or guided conferences
   2. Problem solving conferences
   3. Lectures and demonstrations by trainee
   4. Seminars
   5. Buzz groups
   6. Role playing
   7. Case studies
   8. Others—use of simulators, demonstrations by trainees, audio-visual laboratories, sensitivity training, etc.
C. Automated instruction—self-learning methods
   1. Programed texts
   2. Programed learning machines
   3. Correspondence schools training
D. Miscellaneous training methods
   1. Field trips for observation
   2. Attendance at college, universities, trade shows, meetings, etc.

TOPIC VI. DETERMINING TRAINING NEEDS

A. Organizational needs
   1. Projections of new manpower acquisition
   2. Evaluation of present performance and costs of production
   3. Introduction of new design or change in methods
   4. Organization and manpower planning tables
   5. Labor market conditions
   6. Emerging occupations
B. Employee needs
   1. As judged by department
   2. As determined by work section
   3. As determined by employee's supervisor
C. Requests from various levels of management for special purpose programs

TOPIC VII. JOB INSTRUCTION TRAINING METHOD

NOTE: This method can be used for man-to-man instruction or group training.

A. The job breakdown
   1. Use of job descriptions
   2. Psychological and logical order of job elements and knowledge
   3. Difficulty and frequency analysis
   4. Key steps and key points
   5. Provision for flexibility
B. The trainee population
   1. Selected trainees
   2. Unselected trainees
C. Training timetable
   1. Before trainee or group training is underway
   2. Reevaluation of timetable predicated on trainee or group strengths and weaknesses
D. Selection of method and aids, devices, and materials
   1. Training objectives and behavior desired
   2. Content of program
   3. Availability of qualified instructors
   4. Time allowance and time availability
   5. Allowance for the trainee population
      a. Number
      b. Homogeneity or heterogeneity

c. Capacity
d. Responsibility
e. Interest
f. Individual differences

6. Available facilities and resources
7. Selection and preparation of audiovisual aids
8. Scheduling and arranging for training
9. Communication of arrangements and schedules

E. Teaching pattern
1. Establishing "point of departure"
a. For individual
b. For group
2. Psychological order of presentation
3. Explaining meaningfulness of material to be learned
4. Use of teaching plan
a. Key steps and points
b. Job instruction pattern
(1) Preparing the learners (tell)
(2) Presenting the task to be learned (show and tell)
(3) Letting the learners do the task under supervision (practice)
(4) Testing the learner (progress check)
(5) Coaching (remedial instruction)

5. Use of audiovisual materials and equipment
6. Demonstration of the operational model

NOTE: It is suggested that a film such as "Pattern for Instruction," which highlights job instruction training, be shown and discussed relative to the techniques covered.

TOPIC VIII. TEACHING AND COORDINATING

A. Motivations—intrinsic and extrinsic
B. Positive and negative transfers
C. Reinforcement
D. Other psychological learning principles—see topic I (F)

TOPIC IX. JOB INSTRUCTION TRAINING PRACTICE

NOTE: It is suggested that the teacher assign trainees at least three individual job instruction projects. These training projects should be done one at a time, with group and teacher critique of presentation following each demonstration. One project should be man-to-man, and the other two should be group job instructions. The presentation should include a written report on all the steps the trainee would take if he were to do the actual training job in an industrial or business setting. Special observational guide sheets should be made up by the teacher of the unit for group use in evaluating individual performances. A large trainee group can be divided into two or more sub-groups for practice and group-centered feedback. Teaching assistance should be sought if there are two or more sub-groups. Discussions in the small subgroups should be encouraged to provide maximum feedback to each trainee. Teachers of this unit should provide support, reinforcement, and other assistance required by trainees. Coaching of individual trainees should be tapered off as progress is indicated. Feedback and critique by the unit teacher should be in situational terms. Final evaluation of the trainee should be withheld until after the third training trial.

TOPIC X. CONFERENCE LEADERSHIP TRAINING AND PRACTICE

NOTE: Each trainee should be allowed to prepare for and conduct at least one guided conference. Topics assigned to trainees should be different.

A. When the directed conference is used
B. Qualifications of conference leader
C. Preparation for the conference
D. Use of audiovisual materials
E. Conference leadership tips
F. Handling conference problems
G. Use of resource persons
H. Summarizing the conference
I. Evaluating the conference—participant feedback, evidence of change
J. Practice in conducting directed conferences
K. Group and teacher critique and feedback for conference leader

TOPIC XI. SUPPLEMENTAL ACTIVITIES

NOTE: The activities outlined below should be interspersed during topic IV.

A. Field trips to companies to observe training activities
1. Use of prepared observation sheets
2. Lectures by company training directors or representatives

B. Post field trip discussion and analysis
C. Reading assignments
1. Home reading of books on training
2. Preparation of brief book reports
3. Discussion of reports by subgroups (discussion leader should be reporter)
4. Integration of reports
5. Duplication and distribution of integrated book reports

TOPIC XII. EVALUATING TRAINING RESULTS

A. Methods
1. Performance evaluation (by supervisor)
2. Production improvement (sales, fabrication, etc.)
3. Promotions and transfers made
4. Difficulties in evaluating training

TOPIC XIII. FURTHERING TRAINING CAREER OBJECTIVES

NOTE: The teacher of this unit and the school counselor should hold individual counseling sessions with each trainee.

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

DEPHILLIPS, F. A.; BERLINER, W. M.; AND CRIBBIN, JAMES J. *Management of Training Programs.* Homewood, Ill.: Richard D. Irwin, Inc., 1960.

GULLEY, HOLBERT E. *Discussion, Conference and Group Process.* New York: Holt, Rinehart, and Winston, 1960.

LIKERT, RENSIS. *New Patterns of Management.* New York: McGraw-Hill, 1961.

MESICS, EMIL A. *An Annotated Bibliography on Education and Training in Organizations: Training and Education for Manpower Development.* Ithaca, N.Y.: New York State School of Industrial and Labor Relations, December 1964.

PROCTOR, J. H. AND THORNTON, W. M. *Training: A Handbook for Line Managers.* New York: American Management Association, 1961.

ROSE, HOMER C. *The Instructor and His Job.* Chicago: American Technical Society, 1961.

STATON, THOMAS F. *How to Instruct Successfully.* New York: McGraw-Hill, 1960.

TAYLOR, JACK W. *How to Select and Develop Leaders.* New York: McGraw-Hill, 1962.

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE. *Staff Development, the Supervisor's Job.* Washington: U.S. Department of Health, Education, and Welfare. Office and Clerical Employee Instruction. Supt. of Documents, 1963.

DEVELOPING ORGANIZATIONAL AND OPERATIONAL OBJECTIVES (DOO)

Functional Knowledge for: Budget Officer, Treasurer, Administrative Assistant, Branch Manager, Financial Institution Manager, Industrial Organization Manager

Hours Class: 2 hours daily

Total: 30 hours

Description and Teaching Suggestions

This unit will introduce the development of organizational and operational objectives, their hierarchial nature, and the closely related managerial functions of planning and control. It is difficult to discuss the development of objectives without including the effects of their implementation and appraisal. Trainees should develop an understanding of the nature of objectives, their importance to organizations and individuals, and the necessity for establishing effective objectives so that planning can be carried out and results can be measured. In addition, the need for control is covered so that the trainee will be able to see that objectives have a qualitative dimension and must be evaluated constantly if sound administration is to result.

This unit requires emphasis on the concepts of managerial objective development as they apply to all types of organized activities and the organizations which carry them out. While administrative knowledge is partially transferable, there are, of course, certain peculiarities and individual characteristics in each organization. Any general discussion of management functions cannot take these into consideration. Of necessity, both the teacher and the trainee should facilitate the transfer process by using examples drawn from experience. The development of objectives is not carried on in a vacuum; frame of reference is required. Most people view the process from a background of highly individualized experience. This may be all right if the trainee has a sufficiently broad experience, particularly on a high level, but such is not usually the case. It is therefore important for the instructor to make clear the relationship of overall organizational objectives to those of a particular unit in that organization, as well as to the specific objectives of individuals in that organization. It will also be desirable for the teacher to create an understanding of time in relation to objectives and their attainment. For this reason, both planning and control are considered along with objectives in this unit.

Standards of Achievement

1. Demonstrate knowledge of the nature, importance, and characteristics of organizational objectives.
2. Demonstrate knowledge of the relationship between organizational objectives and operational objectives.
3. Demonstrate knowledge of the necessity for the development of objectives to establish purpose and direction for the organization and the individuals associated with the organization.
4. Understand the hierarchial nature of objectives and the time implications of organizational and operational objectives.

5. Understand the relationship of individual objectives to those of the organization and the desirability of compatibility of this relationship to accomplish optimal organizational effectiveness.
6. Demonstrate understanding of the relationship of objectives with the establishment of policies, procedures, rules, methods, and strategies.
7. Demonstrate knowledge of the need for implementing objectives by effective communication with those individuals in the organization responsible for their implementation.
8. Demonstrate knowledge of the nature of the planning process and plans and their relationship to the attainment of objectives.
9. Understand the need for constant evaluation of objectives to ascertain their pertinence to the purposes of the organization.
10. Understand the nature of administrative control, the establishment of standards, and the need for measurement to determine the effectiveness of results obtained in objective attainment.

Prerequisites for the Study of Developing Organizational and Operational Objectives

Postsecondary education work in business administration, industrial engineering, political science, psychology, sociology, economics, and related subjects. Advanced study in business administration and/or public administration is desirable for some positions. Experience in supervisory positions on all levels is highly desirable. Particularly useful experience would be in planning and evaluation of results, as well as in the development of objectives, policies, and procedures.

Topic Outline

I. Development of Organizational and Operational Objectives
II. The Planning Function and its Relationship to Objectives.
III. Administrative Control and the Measurement of Objective Attainment

TOPIC I. DEVELOPMENT OF ORGANIZATIONAL AND OPERATIONAL OBJECTIVES

A. The nature of objectives
   1. Goals, aims, or purposes over varying periods of time
   2. Part of the planning process
   3. Related to the future of the organization
   4. General or specific
   5. Immediate, long-range, or in between
   6. Applied to total organization or any unit thereof
   7. Applied to groups and/or individual managers
B. The importance of objectives
   1. Serve as reference points for efforts
   2. Include the essential purposes and basic ideas of the organization
   3. Give the organization identification and relate it to the other organizations
   4. Provide basis for the leadership and direction
   5. Necessary for coordinated effort
   6. Provide frame of reference for standards which help in the control of organizational effort
   7. Determine suitable policies, procedures, rules, methods, and strategies
   8. Serve as a motivating force for the individuals in the organization
C. Characteristics of organizational objectives
   1. General and broad in nature
   2. Usually concerned with survival, growth, social obligations, economic contribution, and profits
   3. Must support the purposes of the organization
   4. Hierarchial in nature
   5. May be multiple, but should be compatible
   6. Should be compatible with the objectives of the majority of the individuals in the organization
   7. Usually long range, but must be related to short range and operational objectives
D. Characteristics of short range and operational objectives
   1. Specifically stated with a target date
   2. Closely related to daily operations
   3. Form the basis for planning and control
   4. Clear in intent and meaning
   5. Usually can be accomplished with existing knowledge, technology, and staff
   6. Evolve out of long range organizational objectives which may be visionary in nature
   7. Should lead to direct action and planning
E. Selecting objectives
   1. Identify precise objectives to enable implementation
   2. Clear statement of purpose needed for effective administration
   3. Must be established in relation to each other

4. Must be compatible
5. Must be practical
   a. Conservative
      (1) Avoids discouragement
      (2) Employees more responsive
   b. Expansive
      (1) Challenge for better results
      (2) Few higher goals

F. Making objectives workable
   1. Meaningful for responsible manager—should lead to definite action
   2. Specific for responsible manager
   3. Communications between managers
      a. Understanding objectives
      b. Cooperative participation

G. Managing by objectives
   1. Provides for maintenance and orderly growth of the organization
      a. Awareness of requirements
      b. Measure of achievements
   2. Assigns risks to all managers and makes their progress dependent on producing results
   3. Stresses ability rather than personality of managers
   4. Provides measure of contribution of managerial personnel
   5. Increases teamwork and coordination of effort by defining goals and measuring individual contributions to these goals
   6. Helps define major areas of responsibility for each person in the organization
   7. Helps determine the span of control for each manager
   8. Facilitates more equitable salary administration
   9. Helps to define promotable individuals

TOPIC II. THE PLANNING FUNCTION AND ITS RELATIONSHIP TO OBJECTIVES

A. Characteristics of an effective plan
   1. Functionally related to specific objective
   2. Simple
   3. Sets standards for control and evaluation of performance
   4. Stable, but is flexible
   5. Builds on present resources
   6. Related to function rather than to personalities
   7. Defines areas of responsibility, authority, and accountability
   8. Allows for effective leadership
   9. Provides for effective supervision and control
   10. Takes normal resistance to change into consideration

B. The planning process
   1. A problem—evidence of limited achievement
   2. Clear determination of what must be accomplished
   3. Limiting factors—time, events, psychological, and administrative barriers; lack of information and ability level of personnel
   4. Working hypotheses—tentative answers to the questions: What? Who? When? How? With what? Where? By what method? Under what conditions?
   5. Plan evolution—develop the best practical plan by testing the working hypotheses
   6. Determination of programs and projects and their order of installation and execution
   7. Organization, installation, and activation of the plan
   8. Execution of the plan
   9. Evaluation of the plan, modification, and adjustment

C. Considerations for the development of a plan
   1. Urgency and importance of problem
   2. Amount of leadtime available for solving problem
   3. Experience available with similar problems
   4. Problem solution in terms of time and energy involved
   5. Circumstances possible if problem not solved properly
   6. Availability of money, manpower, and other resources
   7. Is real problem identified; what are the inter-relationships with other problems
   8. How does it relate to long and short range objectives
   9. Availability of information and methods for securing it
   10. Need for selling the solution to higher management and securing their support
   11. Need for cooperation and compliance

D. Analysis of the plan
   1. Definition of problem in relation to: objectives (no compromise), intolerables (no compromise), desirables (can compromise), undesirables (can compromise)
   2. Plan of attack—past experience, applied science, new research
   3. Tentative solutions
   4. Analysis by process of elimination
   5. Decision as to course of action

6. Testing by pilot trial—evaluate and modify
7. Installation of plan

E. Benefits of planning
1. Reduces costs
2. Develops more efficient methods of performance
3. Anticipates obstacles
4. Coordinates future actions
5. Promotes cooperation and participation

TOPIC III. ADMINISTRATIVE CONTROL AND THE MEASUREMENT OF OBJECTIVE ATTAINMENT

A. The nature of administrative controls
1. Control—the foundation for scientific management
2. Objective to be achieved and which can be measured
3. Plans to attain objective
4. Organization and organizing as necessities
5. Standards to measure performance
6. Appraisal by management with corrective action as required

B. Basic approaches to administrative control
1. Engineering, mechanistic, or accounting approach
2. Human relations or behavioral approach
3. Synthesis of both (1) and (2)—usually the most desirable approach

C. Relationship between control and planning
1. Clearness of plans to those who must use them
2. Completeness of plans
3. Integration of planning with objectives
4. Preparation of plans and amount of managerial participation
5. Nature of organization structure and authority relationships
6. Effectiveness of organizational communication
7. Action to be taken to correct deviation
8. Determination of realistic standards
9. Standards based on factual material rather than on whim
10. Arrangements made for modification of plan if it becomes obsolete

D. Development of an effective control system
1. Flexibility of controls
2. Understanding control systems
3. Cost of control systems
4. The organization and control systems
5. Corrective action and the control system
6. Attention to strategic points in the work process
7. Location and correction of bottle-necks
8. Human factors involved—loyalty and competence of personnel
9. Implementation of short range objectives in relation to long range planning and objectives
10. Level of employee morale
11. Determination of optimum performance—"a fair day's work"
12. Intergroup and intragroup relations and their effect on results

E. Development of standards of performance
1. Functions and services to be performed
2. Amount of time available
3. Quantity and quality of output expected and costs involved to achieve
   a. Direct expense
   b. Indirect expense
4. Amount of supervision and staff assistance required, effect of course of action on the work of the organization
5. Capital investment, physical facilities, equipment, and material
6. Adherence to objectives and indications nonadherence
7. Responsibility for success or failure—warning points for abnormal deviations
8. Sequence in which standards can be applied—necessary training
9. Standards strategic to the operation—frequency necessary to ascertain results

F. Establishing the standards
1. Practical and realistic
2. Relate to objectives, policies, and procedures
3. Concerned with human aspects
4. Usually do not involve radical change
5. Participation in the establishment of standards should be encouraged to overcome the hierarchial distance between those who normally formulate standards and those who implement them

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ALBERS, HENRY H. *Principles of Organization and Management, 2nd ed.* New York: John Wiley and Sons, 1965.

DALE, ERNEST. *Management Theory and Practice.* New York: McGraw-Hill, 1965.

DRUCKER, PETER F. *The Effective Executive.* New York: Harper & Row, 1967.

———. *Managing for Results*. New York: Harper & Row, 1964.
———. *The Practice of Management*. New York: Harper & Row, 1953.
GREGORY, CARL E. *The Management of Intelligence*. New York: McGraw-Hill, 1967.
HICKS, HERBERT G. *The Management of Organizations*. New York: McGraw-Hill, 1967.
JEROME, WM. T., III. *Executive Control-The Catalyst*. New York: John Wiley and Sons, 1961.
JUDSEN, ARNOLD S. *A Manager's Guide To Making Changes*. New York: John Wiley and Sons, 1966.
KOONTZ, HAROLD AND O'DONNELL, CYRIL. *Principles of Management, 3rd ed.* New York: McGraw-Hill, 1964.
MCCONKEY, DALE. *How to Manage By Results*. New York: American Management Association, 1965.
MCFARLAND, DALTON E. *Management Principles and Practices, 2nd ed.* New York: Macmillan, 1964.
NEWMAN, WM. H. *Administrative Action, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.
NEWMAN, WM. H.; SUMMER, CHARLES E.; WARREN, E. KIRBY. *The Process of Management, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.
ODIORNE, GEORGE S. *Management By Objectives*. New York: Pitman, 1965.
SCHLEH, EDWARD C. *Management By Results*. New York: McGraw-Hill, 1961.
SCOTT, WILLIAM G. *Organization Theory*. Homewood, Ill.: Richard D. Irwin, Inc., 1967.
WIERNER, ARTHUR M. *Business Administration, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1966.

INDUCTION AND ORIENTATION OF EMPLOYEES (IOE)

Functional Knowledge for: Chief Clerk, Insurance Office Manager, Office Manager, Operations Officer, Branch Manager, Administrative Assistant

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

Designed for trainees who will be working in positions responsible for acquainting new employees with company activities, regulations, and practices, this unit explores the various aspects of induction and orientation policies and procedures. It should enable trainees in responsible positions to be in a position to suggest or recommend policies and procedures for these areas. The importance of induction and orientation policies and procedures to threshold employees should be emphasized.

While this unit is heavily personnel department oriented, it is designed to acquaint trainees with the induction and orientation procedures necessary for new employees whether or not a personnel department exists in a company. For those in organizations having such facilities, it will provide information helpful to the execution of their own assignments; where no personnel department exists, it provides functional knowledge necessary for the successful discharge of their responsibilities.

The discussion method of training should be used extensively throughout the unit. Case method and incident process techniques can be used advantageously by teachers of this unit. Coordination with teachers of other personnel and training subject units is strongly suggested to review material ond to determine areas of concentration of study. Trainees should be encouraged to develop policies of induction and orientation practices during home study assignments, for discussions and critique by group.

Standards of Achievement

1. Demonstrate knowledge of induction and orientation process.
2. Formulate simple induction and orientation policies and procedures.

Prerequisites for Study of Induction and Orientation of Employees

Completion of "Principles of Effective Supervision" unit or demonstration of equivalent experience or proficiencies. The "Personnel Policies" unit may be studied concurrently.

Topic Outline

I. Importance of Induction and Orientation
II. Scope of Induction and Orientation
III. Policies of Induction and Orientation
IV. Final Employment Interview and Acceptance
V. Notification of Hire to New Employee
VI. Initial Induction Procedures for New Employees
VII. Final Induction and Orientation of New Employees
VIII. Audit of Induction and Orientation Policies and Procedures

TOPIC I. IMPORTANCE OF INDUCTION AND ORIENTATION

A. Importance to new employee
   1. First impressions of organizational operation
   2. Knowing expectations of organization, department, and supervisor

3. Knowledge of available employee benefits
4. Integration into work group
5. Assignment to work area or station

B. Importance to organization
1. Getting employee started right
2. Reduction of problems in department and production
3. Human relations practices image
4. Proper records
5. Conservation of time of supervisors
6. Reduction of turnover
7. Identification employer-employee interests
8. Expression of organization philosophy of retaining long-service employees

C. Importance to supervisor
1. Avoidance of need to explain policies with resultant lost time
2. Quick integration of employee as a productive unit
3. Opportunity to establish human relationships with new employees

TOPIC II. SCOPE OF INDUCTION AND ORIENTATION

A. Formal versus informal procedures of induction and orientation
1. Size of company
2. Philosophy, interest, and understanding of management
3. Time-savings factors

B. Administration by personnel department where possible

C. Plant or office security and safety procedures and practices

D. Medical examinations

E. Explanation of organization benefits
1. Insurance
2. Employee benefits and services
3. Department rules and regulations

F. Labor organization—explanation as required

TOPIC III. POLICIES OF INDUCTION AND ORIENTATION

A. Establishing induction and orientation policies
1. Management
2. Suggestions and recommendations for modifications, additions, or deletions

B. Considerations in formulating policies
1. Expression of philosophy of organization
2. Uniform processing of new employees
3. Cost considerations—personnel, time, publications, facilities, etc.
4. Method considerations
5. Availability of personnel to induct new employees
6. Training of inducting and orienting personnel
7. Incorporation of induction and orientation policies into personnel policies manual
8. Policies on auditing of induction and orientation procedures

TOPIC IV. FINAL EMPLOYMENT INTERVIEW AND ACCEPTANCE

A. Final interview for employment (in conjunction with, or apart from, personnel department)
1. Acquainting applicant with policies and benefits of organization in general
2. Stating date of notification of acceptance
3. Checking all preemployment records of applicant
a. Application form
b. Evaluation records
c. Records by investigators and interviewing personnel
d. Employment test results

B. Establishing and maintaining organization image by final interviewer

C. Answering applicant's questions

TOPIC V. NOTIFICATION OF HIRE TO NEW EMPLOYEE

A. Notification by mail
1. Letter
2. Postcard

B. Notification by wire
1. Telegram
2. Telephone

C. Maintenance of proper business relationship
1. Checking accuracy of where or to whom newly hired employee is to report
2. Preparations new employee must make
a. Papers—special
b. Notice of hire for admittance
c. Tools or uniform

D. Notification to person or department personnel to whom newly hired employee will report

E. Notification to payroll department of new hire

TOPIC VI. INITIAL INDUCTION PROCEDURES FOR NEW EMPLOYEES

A. Decision to process new employees as individuals or in groups

B. Plant security personnel
1. Admitting procedure

2. Routing to various processing stations in security department
3. Fingerprinting and photographing—as required by company policy or security regulations
4. Issuance of badge—as required
   a. Temporary
   b. Permanent
5. Issuance of initial time card and time card number assignment

C. Medical department or examination
1. Policy of preemployment medical examination
2. Posthire medical examination
3. Extent of medical examination

NOTE: If hire is contingent on medical examination findings, applicant should be told (see I (A) (1). Pros and cons of preemployment medical examinations should be discussed at this point by group.

4. Notice of physical limitations of newly hired person in personnel records and to supervisor of employee
5. Notice of contagious disease new employee may have

TOPIC VII. FINAL INDUCTION AND ORIENTATION OF NEW EMPLOYEES

A. By personnel department (where such facility exists)
1. Presentation of company history and objectives
2. Explanation of major rules and regulations
   a. Reporting time
   b. Failure to report
   c. Absences
   d. Plant or office deportment
   e. Report of medical department or examining physicians
   f. Probation period (if not previously explained in employment process)
   g. Uniforms and tools
   h. General safety rules
   i. Merit increase or salary review system
3. Informing new employees about labor organization (if not previously done)
   a. Strict adherence to provisions of Taft-Hartley and other laws by exposition of information
   b. Avoidance of opinions in violation of organization-labor union agreement
   c. Maintenance of organizational philosophy about labor-management relations
4. Explanation of employee benefits and services
   a. Insurance—health and life
   b. Pension plan eligibility
   c. Recreation facilities
   d. Bonds
   e. Profitsharing and stock acquisition plans
   f. Breaks during day
   g. Miscellaneous benefits and services
      (1) Teams
      (2) Awards
      (3) Suggestion system
5. Distribution of various forms
   a. Pension
   b. Health and life insurance applications
   c. Bond and other payroll deductions
   d. Miscellaneous forms
6. Helping new employees complete forms
7. Distribution of pertinent organization literature for study
8. Assignment to supervisor
   a. Directions to go to supervisor
   b. Personal escort service to supervisor and introduction

B. By the employee's supervisor
1. Introduction to fellow workers
2. Facilities—toilet, washroom, etc.
3. Lunchroom—lunch periods, breaks
4. Lockers, uniforms, tool chits
5. Requisitioning procedure
6. Information to payroll distribution
7. Timecard and clock area
8. Special rules for department in area
9. Restress rules of punctuality and attendance
10. Pass privileges
11. Answering and use of telephone
12. Reporting after illness
13. Vacation schedule for department if different than plant or office
14. Shifts, shift differentials, overtime
15. Introduction to shop steward
16. Responsibility for equipment, tools, and product
17. Special department deportment rules
18. Miscellaneous information peculiar to department or group
19. Training assignment on the job
20. Attendance at orientation sessions or meetings
21. Rules governing probation period
22. Standards of performance
23. Counseling and appraisal interviews

TOPIC VIII. AUDIT OF INDUCTION AND ORIENTATION POLICIES AND PROCEDURES

A. Attitude surveys
B. Audit in personnel department
C. Audit of supervisory practices
D. Audit of communication network

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BLACK, J. M. AND FORD, G. B. *Front-Line Management*. New York: McGraw-Hill, 1963.

CALHOON, R. P. *Managing Personnel*. New York: Harper and Row, 1963.

CHRUDEN, H. J. AND SHERMAN, A. W., JR. *Personnel Management*. Englewood Cliffs, N.J.: Prentice-Hall, 1963. Examinations.

———. *Readings in Personnel Management, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

FLIPPO, E. B. *Principles of Personnel Management*. New York: McGraw-Hill, 1961.

NEW YORK STATE SCHOOL OF INDUSTRIAL AND LABOR RELATIONS. *Industrial and Labor Relations Review*. Ithaca, N.Y.: Cornell University. Issued periodically. Contains numerous applicable references useful in unit.

NILES, H. E.; NILES, M. C.; AND STEPHENS, J. C. *The Office Supervisor: His Relations to Persons and to Work*. New York: John Wiley and Sons, 1959.

SPATES, T. G. *Human Values Where People Work*. New York: Harper and Row, 1960.

SPRIEGEL, W. R.; SCHULTZ, E.; AND SPRIEGEL, W. B. *Elements of Supervision*, New York: John Wiley and Sons, 1957.

ORGANIZATIONAL AND MANPOWER PLANNING (OMP)

Functional Knowledge for: Administrative Assistant, Branch Manager, Financial Institution Manager, Industrial Organization Manager, Treasurer, Budget Officer

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 60 hours

Description and Teaching Suggestions

This unit is designed to help trainees develop and practice the techniques of organizational and manpower planning. The importance of organization and manpower to orderly growth or redirection of the company's efforts is pointed up. Emphasis, however, is placed on the problems faced by organization planners and the means they use to plan manpower acquisition or development for short- and long-range periods.

To make laboratory sessions as realistic as possible, the teacher should prepare basic materials used in manpower planning for a fictitious organization. It is suggested that these materials be obtained from an operating company and disguised to avoid identification. Assignments for the laboratory periods should be related to the case material. The initial laboratory time should be devoted to studying the case-study organization, its problems, its goals, its affiliations (subsidiaries, merger plans, contracts, etc.) before moving into specific planning exercises. As one of the first exercises, the teacher may want to assign trainees the task of preparing charts of the existent organization. At appropriate times in the unit, the trainees should develop personnel rating forms, role play appraisals, replacement tables, and coded organization charts showing positions to be filled for several growth periods. The organization planning programs as well as the planning methods used by several companies should be explored and discussed. It is suggested that the teacher arrange for guest speakers from the organization and manpower planning staffs of various companies to discuss special manpower planning problems and solutions.

A good concluding exercise for the unit may be to have trainees present an outline of their suggested management training program to fill planned organizational positions. In addition, suggestions for the necessary descriptions of contemplated openings should be made part of the laboratory or home assignment plan.

Standards of Achievement

1. Develop simple organization chart.
2. Design merit rating form.
3. Conduct appraisal of employees.
4. Draw up manpower inventory.
5. Understand methods of developing people to meet future needs of company.

Prerequisites for Study of Organization and Manpower Planning

Two years of postsecondary education or equivalent work experience in administration.

Topic Outline

I. Company Organization
II. Organization Planning
III. Personnel Audits
IV. Employee Appraisals
V. Appraisal of Management Personnel
VI. Manpower Inventories
VII. Locating Promotable Personnel
VIII. Determining Recruitment Needs
IX. Developing Personnel for Advancement
X. Summary

TOPIC I. COMPANY ORGANIZATION

A. Structures
   1. Line
   2. Line and staff
   3. Functional
   4. Spiral
   5. Flat
   6. Vertical
B. Organization chart
   1. Lines of accountability
   2. Reporting relationships
C. Departmentalization
D. Other breakdowns of organization
   1. By product
   2. By process
   3. By location
E. Staff and line relationships
F. Table of organization (manning table)

TOPIC II. ORGANIZATION PLANNING

A. Factors affecting company growth, diversification, or change of strategy
   1. Economic
   2. Technologic
   3. Market
   4. Population growth
   5. Communication and transportation improvements
B. Need for close communication of organizational planner with top management echeleons
   1. Time needed for planning
   2. Dynamics of change
C. Determining future management positions
   1. By direct information from executive
   2. By survey of divisional or departmental executives
D. Establishing periods for planned growth
E. Necessity for organizational planning
   1. Length of time to develop managers
   2. To know who is available for promotion
   3. To determine training and development needs
   4. To pinpoint recruitment needs
F. Preparing the organizational plan

TOPIC III. PERSONNEL AUDITS

A. Purpose
   1. Shows positions which are inadequately manned
   2. Shows individuals whose capabilities are not fully utilized
   3. Shows where management development may be needed
   4. Accounts for utilization of manpower resources
B. Methods
   1. Summary of individual management appraisals
   2. Study of manpower turnover, retirement, etc.
   3. Analysis of ages of personnel

TOPIC IV. EMPLOYEE APPRAISALS

A. Merit rating systems
   1. Point system
   2. Ranking system
   3. Narrative ratings
      Note: See Employee Appraisal and Counseling unit.
B. Uses
   1. Salary review
   2. Promotion
   3. Assignment to management development program
C. Dangers in rating
   1. Subjectivity
   2. Biases
   3. Halo effect
   4. Central tendency

NOTE: See Employee Appraisal and Counseling unit.

TOPIC V. APPRAISAL OF MANAGEMENT PERSONNEL

A. Performance standards
   1. Goal setting
   2. Management by objectives
   3. Appraisal conferences
B. Psychological appraisal
   1. Purposes
   2. Advantages
   3. Problems
   4. Use of outside psychologists
   5. Imparting results to company
   6. Imparting results to man

TOPIC VI. MANPOWER INVENTORIES

A. Developed from consolidating appraisals of managers, potential managers, and technicians
B. Coded organization chart—special code to indicate readiness for promotion, expected retirement date, etc.
C. Replacement tables—table listing replacement or backstop possibilities for each job
D. Skill banks
E. Central personnel files and use of electronic data processing

TOPIC VII. LOCATING PROMOTABLE PERSONNEL

A. Inside the company
   1. Promotion from ranks
   2. Self-nomination—job posting
   3. Recommendations from present personnel
B. Outside the company
   1. Recruiting experienced men
      a. Advantages
      b. Disadvantages
      c. Methods
   2. Hiring management trainees
      a. For general jobs
      b. For specialized jobs—accounting, engineering, etc.
   3. Sources
      a. Colleges
      b. Graduate schools
      c. Military
      d. Other sources

TOPIC VIII. DETERMINING RECRUITMENT NEEDS

A. Gross approach—number of employees needed for management positions determined in relation to sales
B. Specific approach—number of men needed predicted for each division or department in same manner as budget or objectives
C. Requirements for technologists and professionals

TOPIC IX. DEVELOPING PERSONNEL FOR ADVANCEMENT

A. Cadet training programs
   1. How they operate
   2. Advantages
   3. Limitations
B. Coaching and understudy methods
   1. How they operate
   2. Advantages
   3. Limitations
C. Use of schools
   1. Sending personnel to special schools
      a. Official assignment
      b. Tuition refund
   2. Bringing teachers to company
D. Use of special consultants
   1. Seminars
   2. Individual training

TOPIC X. SUMMARY

A. Purpose of organizational planning
B. Major planning techniques
C. Selection of trainees
D. Methods of training
E. Suggested further studies

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ALLEN, LOUIS. *Management and Organization.* New York: McGraw-Hill, 1958.

CORSINI, R. J., ET AL. *Role Playing in Business and Industry.* Glencoe, Ill.: Free Press of Glencoe, 1961.

NATIONAL INDUSTRIAL CONFERENCE BOARD, INC. *No. 183, Corporate Organizational Structures.* New York: National Industrial Conference Board.

———. *No. 189, Developing Managerial Competence: Changing Concepts, Emerging Practices.* New York: National Industrial Conference Board, Inc., 1964.

PIFFNER, JOHN AND SHERWOOD, FRANK. *Administrative Organization.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Additional texts and materials for this unit may be found listed under the "Performance Standards" unit.

PAYROLL AND EMPLOYEE TAX RECORDS (PTR)

Functional Knowledge for: Chief Clerk, Office Manager, Junior Executive, Trainee Manager, Insurance Office Manager, Administrative Assistant, Branch Manager, Credit Union Supervisor

Hours Class: 1 hour daily

Total: 10 hours

Description and Teaching Suggestions

This unit will introduce trainees to the concepts of payroll recordkeeping and will familiarize them with employer and employee taxes and typical payroll deductions which are made in consequence of benefit programs or union contract provisions.

This course requires that the lecture method be used. Teachers should have sample sets of forms for class distribution.

Standards of Achievement

1. Know current deduction and limits for social security tax.
2. Know structure and deduction made for Federal and/or State/city income taxes.
3. Prepare simple payrolls, starting from time cards to journal entries and payroll book or ledger.
4. Prepare appropriate forms for employers and employees—Federal depository receipts, W-2, W-4, 940, 941, and unemployment, and insurance forms.

Prerequisites for Study of Payroll and Employee Tax Records

Trainee selection standards.

Topic Outline

I. Introduction to Payroll Accounting
II. Taxes and Other Payroll Deductions
III. Computation of Gross and Net Earnings
IV. Forms and Methods Used in Payroll Accounting
V. Recording Payroll

TOPIC I. INTRODUCTION TO PAYROLL ACCOUNTING

A. Need for payroll records
B. Definitions of and distinction between terms
   1. Wages
   2. Salary
C. Brief history of payroll legislation from 1913 to present
   1. Withholding tax
   2. FICA
   3. Minimum wage
   4. Medicare

TOPIC II. TAXES AND OTHER PAYROLL DEDUCTIONS

A. Reasons for payroll deductions
B. Tax deductions
   1. Federal, State, and/or city income taxes
      a. Rates—tables, graduations, marital status
      b. Effect of exemptions
   2. Social Security (FOAB contribution)
      a. Rates applicable and matching by employer
      b. Current graduation
      c. Limits on amount withheld for 1 year by employer
   3. Tax withholding statement from employer
   4. Employer taxes (items for which taxes are not withheld, but which do accrue as benefits to employees)
      a. Unemployment insurance
      b. Disability benefits insurance
      c. Workmen's compensation insurance
      d. Noncontributing pension plans
C. Other deductions
   1. Savings bonds
   2. Hospitalization and insurance
   3. Union dues
   4. Pensions
   5. Credit unions
   6. Loans
   7. Garnishees

TOPIC III. COMPUTATION OF GROSS AND NET EARNINGS

A. Salaries
   1. Weekly
   2. Biweekly
   3. Semimonthly
   4. Monthly
   5. Annual
   6. Overtime
B. Wages
   1. Timecards
   2. Piece work
   3. Overtime
   4. Other incentive
C. Holiday and vacation allowances
D. Deductions (see topic II)

TOPIC IV. FORMS AND METHODS USED IN PAYROLL ACCOUNTING

A. Forms preparation
   1. W–4
   2. W–2
   3. 941
   4. 940
   5. Federal depository receipt
   6. State quarterly reports
   7. Unemployment information forms
   8. Employees' earning records
B. Payroll preparation methods
   1. Payroll journals and regular checks
   2. Write-it-Once forms (Hadley system)
   3. Mechanized recording procedures
C. Legal requirements on employer to forward withheld taxes and contributions.

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BARON, HAROLD AND STEINFELD, SOLOMON C. *Clerical Record Keeping, 2nd ed.* Cincinnati: South-Western, 1965. Workbooks, achievement tests, and teacher's editions.

HADLEY EDITORIAL STAFF AND THISTLETHWAITE, ROBERT L. *Payroll Accounting, 5th ed.* New York: McGraw-Hill, 1961.

———. *Payroll Record Keeping, 7th ed.* New York: McGraw-Hill, 1965. Enveloped kit and teacher's key.

NANASSY, LOUIS C. *Standard Payroll Project, 2nd ed.* New York: Pitman Publishing Corp., 1962.

PENDERY, JOHN A. *Clerical Payroll Procedures, 4th ed.* Cincinnati: South-Western, 1962. Teacher's manual.

PENDERY, JOHN A. AND KEELING, B. LEWIS. *Payroll Records and Accounting.* Cincinnati: South-Western, 1966. Achievement tests and manual.

PERFORMANCE STANDARDS (PST)

Functional Knowledge for: Chief Clerk, Credit and Collection Manager, Credit Union Supervisor, File Service Worker, Office Manager, Process-Description Writer, Safe Deposits Manager, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, Administrative Assistant, Insurance Office Manager, and all Level III jobs EXCEPT Direct-Mail Specialist

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

Trainees will be given an introduction to performance standards. They will learn that the purpose of any performance standards program is to establish acceptable performance of employees in an objective manner. The unit will teach trainees that such information may be used in a number of important applications, including the filling of vacancies, selections for promotion, the granting of pay increases, and which classifications of employees should be covered under a comprehensive performance standards program. In addition, they will learn several methods of measuring performance, the factors which affect each method, and how one method makes it possible to provide for a different emphasis to be placed on each factor.

The central importance of communications regarding any performance standard program will be emphasized. A discussion will be held on the methods used to train subordinate supervisors in how to carry out such a program. There will be extensive consideration of the information to be given to the employees of the organization as well as the written and oral communications techniques used in transmitting this information. The reasons it is important to discuss performance ratings with employees as well as the adverse consequences which result when no periodic discussions occur will be discussed. With this understanding, the trainees will be shown the factors which should be considered in designing performance rating forms. In class discussions, the selection of individual rating terms and the design of the rating forms will be covered. Trainees should be provided the opportunity to design their own performance standard forms

The teacher should provide case examples of employee performance so that trainees may gain practice in evaluating performance, reviewing and defending the evaluation to a second level of management, and discussing it with the employee being rated.

Standards of Achievement

1. Know the areas where performance standard results may be applied.
2. Classify employees covered under performance standards.
3. Know methods of measuring performance.
4. Demonstrate ability to communicate performance standards program and individual performance evaluation using all available in-plant media.
5. Design performance standard forms for different employee classes.

Prerequisites for Study of Performance Standards

Two years of post-secondary education or equivalent in supervisory experience. The Employee Appraisal and Counseling unit is suggested for concurrent study.

Topic Outline

I. History and Concepts of Performance Standards
II. Employees Covered Under Performance Standards
III. Methods of Measuring Performance
IV. Factors in Hourly and Nonsupervisory Performance Rating Plan
V. Managerial and Professional Rating Plan
VI. Design and Use of Performance Standard Forms
VII. Communication of Performance Standards

VIII. Practice in Setting Standards and Rating Forms Design
IX. Appraisal of Performance Against Standards
X. Counseling After Appraisal

TOPIC I. HISTORY AND CONCEPTS OF PERFORMANCE STANDARDS

A. Definition of performance standards
B. Historical background
C. Determination of performance in an objective manner
   1. Acceptability of standard
   2. Attainability of standard by majority of employees in group
D. Using results of evaluations
   1. To fill vacancies
   2. To make promotions
   3. To grant pay increases
   4. For coaching and counseling
   5. To indicate need for training

TOPIC II. EMPLOYEES COVERED UNDER PERFORMANCE STANDARDS

A. Separate form and system for different classifications within an organization
   1. Hourly
   2. Hourly trainees
   3. Salary—nonsupervisory
   4. Salary—managerial and professional
B. Reasons for covering all employees

TOPIC III. METHODS OF MEASURING PERFORMANCE

A. Comparison of individuals in a group
B. Comparison of individuals against an objective standard
   1. Yardstick not affected by changes in personnel
   2. Factors can be weighted to reflect relative importance
C. Performance standards for a group
D. Performance standards for an individual

TOPIC IV. FACTORS IN HOURLY AND NONSUPERVISORY PERFORMANCE RATING PLANS

A. Hourly
   1. Quantity of work
   2. Quality of work
   3. Job attitude
   4. Attendance and lateness
B. Salaried nonsupervisory
   1. Quantity of work
   2. Quality of work
   3. Dependability
   4. Job attitude
   5. Other factors
      a. Initiative
      b. Job knowledge
      c. Judgment
      d. Organizing ability
      e. Ability to work with people
C. Degrees of evaluating each factor
   1. Unsatisfactory
   2. Fair
   3. Good
   4. Very good
   5. Outstanding
D. Narrative statements describing performance and areas for improvement

TOPIC V. MANAGERIAL AND PROFESSIONAL RATING PLAN

A. Performance results for the year
   1. Goals achieved ahead of schedule
   2. Goals not achieved
B. Technical segment of job duties
C. Operating methods
   1. Managerial
   2. Personal
   3. Relations with people
D. Quantitative and qualitative statement of acceptable or satisfactory performance
E. Overall performance rating
F. Areas in which improvement is indicated
G. Potential for positions of greater responsibility
H. Positions to which promotable and time of promotability
I. Individual development plan arrived at by superior and subordinate

TOPIC VI. DESIGN AND USE OF PERFORMANCE STANDARDS FORMS

A. Simplicity of forms
B. Limitation of number of factors
C. Combined forms used by some large organizations
   1. Specific factors or standards on one side
   2. Opposite side provides space for general comments
   3. Separate space to rate trainees
D. Responsibility for rating
   1. Immediate supervisor
   2. Rating reviewed and approved by second management level before being discussed with employee

E. Limitation on applicability of forms for certain jobs
   1. Resorting to statements regarding satisfactory performance as generated by group holding like jobs
   2. Statements generated and agreed to by subordinate in individual interview with supervisor

TOPIC VII. COMMUNICATION OF PERFORMANCE STANDARDS

A. All supervisors trained to administer the program
B. All employees advised of complete details of the program
   1. Written and oral communication
   2. In groups or individually
C. Reasons for not discussing ratings
   1. May cause needless controversy
   2. May wish to keep scoring method secret
D. Reasons for reviewing ratings
   1. Answers for any controversy or misunderstanding
   2. Forces supervisor to be more objective and observant
   3. Provides regular opportunity to suggest ways to improve job performance
E. Industrial relations records and files

NOTE: See Employee Appraisal and Counseling unit.

TOPIC VIII. PRACTICE IN SETTING STANDARDS AND RATING FORMS DESIGN

NOTE: Trainees should be given opportunities to lead groups of other trainees in setting group standards and putting them on paper for distribution. Additionally, each trainee should have an opportunity to set individual performance standards with another trainee acting as the subordinate. Group critiques and discussion, and teacher evaluation of trainee performance should be used in this part of the unit.

TOPIC IX. APPRAISAL OF PERFORMANCE AGAINST STANDARDS

A. Observation
B. Measurable results
C. Statistics
D. Survey
E. Interviews

TOPIC X. COUNSELING AFTER APPRAISAL

NOTE: See Employee Appraisal and Counseling unit.

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

BATTEN, J. D. *Tough Minded Management*. New York: American Management Association, 1963.

BLOCKER, DONALD H. *Developmental Counseling*. New York: Ronald Press, 1966.

CALHOON, RICHARD P. *Cases in Personnel Management and Supervision*. New York: Appleton-Century-Crofts, 1966.

COSTELLO, TIMOTHY AND ZALKIND, SHELDON S. *Psychology in Administration*. Englewood Cliffs, N.J.: Prentice-Hall, 1963.

FLIPPO, EDWIN B. *Principles of Personnel Management*. New York: McGraw-Hill, 1961.

PIGORS, PAUL; MEYERS, CHARLES A.; AND MALM, F. T. *Management of Human Resources*. New York: McGraw-Hill, 1964.

VROOM, VICTOR H. *Work and Motivation*. New York: John Wiley and Sons, 1964.

WARTERS, JANE. *Techniques of Counseling, 2nd ed.* New York: McGraw-Hill, 1964.

PERSONNEL POLICIES (PP)

Functional Knowledge for: Administrative Assistant, Financial Institution Manager, Industrial Organization Manager, Treasurer, Budget Officer

Hours Class: 2 hours daily Total: 40 hours

Description and Teaching Suggestions

The emphasis in this unit will be on the examination and establishment of sound personnel policies. Trainees will receive a practical framework of business and government policies as they apply to personnel within an organization. The need for uniform application of these policies, the manner and techniques of their administration, and the establishment of appropriate controls to maintain their effectiveness should also be discussed. Teachers should carefully evaluate the extent of trainees' prior experience and education in order to pace the presentation and discussion.

Classwork should include actual problems arising from particular policies which are known to or are within the experience of trainees; for example, em-

ployment, training, etc. Wherever possible, examples of ineffective policies or their administration should be elicited from trainees. Individuals should be encouraged to analyze and evaluate known policies and to make recommendations for their improvement.

Where practical, trainees should bring to class written organization policies with which they are familiar. Manuals, forms, etc., should serve as work material to make comparative discussions meaningful.

Standards of Achievement

1. Understand purposes of personnel policies.
2. Know how personnel policy administration integrates with overall organization objectives.
3. Establish basic program of personnel policies.
4. Demonstrate basic evaluations of policy effectiveness.

Prerequisites for Study of Personnel Policies

Trainee selection standards.

Topic Outline

I. Nature of Organizations
II. Personnel Administration
III. Selection and Placement
IV. Training
V. Compensation
VI. Employee Services and Benefits
VII. Union Relations
VIII. Evaluating Effectiveness of Policies

TOPIC I. NATURE OF ORGANIZATIONS

A. Provide goods and/or services
B. Dependent on skills and knowledge of employees
C. Require goals and objectives

TOPIC II. PERSONNEL ADMINISTRATION

A. Purposes of personnel policies
   1. Standards of organizational behavior
   2. Principle of equality in dealing with personnel
   3. Expression of philosophy and concern of management
B. Functions
   1. Recruitment
   2. Selection and placement
   3. Training
   4. Compensation
   5. Company services
   6. Union relations
C. Development
   1. World War I—manpower needs
   2. Scientific management
      a. Taylor
      b. Hawthorne studies
   3. Contributions of social sciences
   4. Growth of organizations
      a. Government
      b. Private industry

TOPIC III. SELECTION AND PLACEMENT

NOTE: In this topic, emphasis should be on policy formulation and implementation rather than on specific techniques.

A. Selection from within organization
   1. Manning tables
   2. Merit, rating, or appraisal systems
   3. Performance information—quantitative and qualitative
   4. Objective measures for promotion or transfer
      a. Testing
      b. Seniority
      c. Level of education
   5. Experience and other factors
B. Selection from outside organization
   1. Manning tables
   2. Job description and specification as a base
      a. Job duties
      b. Level of skill
      c. Education required
   3. Use of recruitment sources
      a. Employee referrals
      b. Advertisement
      c. Public applications
      d. Schools
      e. State employment services
      f. Private employment agencies
   4. Interviewing and investigating policies
      a. Courtesy
      b. Methods
   5. Testing policies
      a. Mental abilities
      b. Aptitude
      c. Interest
      d. Personality
      e. Achievement tests
      f. Selection and rejection ratios
   6. Minimum education or training requirements for acceptance
   7. Physical standards (legal, job requirements)

C. Termination of employees
   1. Reasons for termination
      a. Work performance
      b. Technological change
      c. Temporary employment
      d. Resignation
      e. Economic or organizational change
      f. Violation of company rules or law (garnishment of pay, insobriety, etc.)
   2. Payment for accrued benefits
      a. Vacation
      b. Employee insurances
      c. Severance pay components
      d. Profit sharing and pension plan benefits
   3. Policy on exit interviews

TOPIC IV. TRAINING

A. Induction and orientation
   1. New employees
   2. Transferred employees
B. Development of skills
   1. Secretarial
      a. Typing
      b. Stenography
      c. Office practices
   2. Trades and crafts
      a. Apprentice programs
      b. Refresher courses
      c. Promotion preparation
   3. Communication skills
      a. Writing
      b. Public speaking
   4. Administrative skills
      a. Company policies and procedures
      b. Budget preparation
C. Human relations and supervisory training
   1. Group interaction workshops
   2. Techniques of control
   3. Fundamentals of behavioral sciences
D. University training
   1. Specific courses paid by company
   2. Management development programs
   3. Degree programs—company assisted
E. On-the-job training
   1. Conducted by supervisor
   2. Classroom supplements
F. Safety policies, practices, and training

TOPIC V. COMPENSATION

A. Amount of compensation
   1. Relation of wages to work area
      a. Position of firm in an industry and community
      b. Contract commitments
   2. Relation of pay within company
      a. Importance of position
      b. Exempt and nonexempt status
      c. Union contracts
      d. Job evaluation plan
      e. Differences in performance and merit plans
B. Administration of pay plan
   1. Timing of increases
      a. Annual
      b. Merit
      c. Contract renegotiation
      d. Cost of living
   2. Frequency of increases
      a. Promotion
      b. Reclassification
      c. Position in salary range
C. Methods of payment
   1. Production
      a. Piece rate
      b. Group rate
   2. Time spent
      a. Hourly
      b. Daily
      c. Weekly
   3. Incentives
      a. Combination piece and time rates
      b. Cash bonus
   4. Salaries
      a. Annual
      b. Monthly
      c. Weekly
   5. Deferred compensation
      a. Profit sharing
      b. Pension plans
      c. Stock option
   6. Compensation for travel

TOPIC VI. EMPLOYEE SERVICES AND BENEFITS

A. Hours of work
   1. Normal work week
      a. 40 hours
      b. 35 hours
   2. Excess of normal hours
      a. Overtime
         (1) 1–½ times normal rate
         (2) 2–½ times for holiday work
      b. Premium pay and shift differentials

B. Time off with pay
   1. Vacations
   2. Excused absences
      a. Election Day
      b. Illness in family
      c. Long service
      d. Religious observance
      e. Personal illness
   3. Military leave
   4. Holidays

C. Employee insurances
   1. Hospital
   2. Medical
   3. Life
   4. Major medical
   5. Salary continuation
   6. Travel
   7. Workmen's compensation and disability benefits
   8. Social Security

D. Recreational activities
   1. Teams
   2. Social clubs

E. Miscellaneous employee services
   1. Medical facilities
   2. Cafeteria and recreational facilities
   3. Product and entertainment discounts
   4. Service awards
   5. Suggestion awards
   6. Uniforms
   7. Loan services
   8. Bond purchases
   9. Pension plans
   10. Special savings plans
   11. Retirement counseling

TOPIC VII. UNION RELATIONS

A. Attitudes
   1. Belligerent
   2. Bargaining
   3. Follow-the-leader
   4. Cooperative

B. Legislation
   1. Taft-Hartley and Landrum-Griffin Acts
   2. Wagner Acts
   3. Special government legislation
   4. Right-to-work laws

C. Resolving differences
   1. Collective bargaining
   2. Arbitration
   3. Mediation
   4. Injunction
   5. National Labor Relations Board

TOPIC VIII. EVALUATING EFFECTIVENESS OF POLICIES

A. Records
   1. Turnover
   2. Vacancy rates
   3. Performance appraisals
   4. Management audits

B. Surveys
   1. Attitude of employees
   2. Competitive market information
      a. Wages
      b. Jobs
      c. Benefits

C. Organization feedback
   1. Meetings
   2. Union grievances
   3. Exit interviews
   4. Suggestion system

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

CHRUDEN, HERBERT J. AND SHERMAN, ARTHUR W., JR. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 1966.

———. *Readings in Personnel Management, 2nd ed.* Cincinnati: South-Western, 1966.

FLIPPO, EDWIN P. *Principles of Personnel Management, 2nd ed.* New York: McGraw-Hill, 1966.

LANGSNER, ADOLPH AND ZOLLITSCH, HERBERT G. *Wage and Salary Administration.* Cincinnati: South Western, 1961.

NATIONAL INDUSTRIAL CONFERENCE BOARD. *Statements of Personnel Policy (Studies in Personnel Policy 169).* New York: National Industrial Conference Board, Inc., 1959.

———. *Personnel Practices in Factory and Office.* New York: National Industrial Conference Board, Inc., 1965.

SCOTT, WALTER DILL; CLOTHIER, ROBERT C.; AND SPRIEGEL, WILLIAM R. *Personnel Management, 6th ed.* New York: McGraw-Hill, 1965.

TAYLOR, JAMES, H. *Personnel Administration.* New York: McGraw-Hill, 1965.

YODER, DALE; HENEMAN, G. H.; TURNBULL, JOHN; AND STONE, C. HAROLD. *Handbook of Personnel Management and Labor Relations.* New York: McGraw-Hill, 1965.

PRINCIPLES OF EFFECTIVE SUPERVISION (PES)

Administrative Skill for: Bank Cashier, Chief Clerk, Credit and Collection Manager, Credit Union Supervisor, File Service Worker, Insurance Office Manager, Office Manager, Process-Description Writer, Safe Deposits Manager, Administrative Assistant, Branch Manager, General Foreman, Operations Officer, Procurement Services Supervisor, Junior Executive, Trainee Manager, and all Level III jobs EXCEPT Direct-Mail Specialist

Hours Class: 2 hours daily — Total: 60 hours

Description and Teaching Suggestions

The major objectives of this unit are to develop supervisory skills and knowledges. The unit introduces the trainee to the principles of effective supervision and the application of these principles to actual situations. Specifics concerning morale, behavior, personality, and office supervision can be covered in case studies and in role playing. The trainee, therefore, has the dual responsibility of learning and application. The emphasis during the first part of each topic is learning; the emphasis during the second part is application. The unit is outlined so as to afford the teacher the opportunity to use various teaching methods. The nature of the unit content requires that qualitative standards be applied. Teachers must judge the trainee's ability to use the imparted knowledge under simulated practice conditions. A few pass-fail written tests may be used to check acquired knowledge.

It is suggested that the teacher check other units contained in the guide for detailed topic content of some of the topics in this unit. For example, applicable subject matter for subtopic VI.A. may be found in the Fundamentals of Interviewing unit. The effectiveness of this unit, therefore, will depend heavily on the teacher's flexibility and skill in handling the varying levels of trainee knowledge to be found in the group.

Standards of Achievement

Demonstrate the effective application of principles of supervision under simulated practice conditions.

Prerequisities for Study of Principles of Effective Supervision

Trainee selection standards.

Topic Outline

I. The Function of Supervision
II. The Supervisory Job: General Responsibilities
III. Communicating with Employees
IV. Organizing Work
V. Evaluating Employees
VI. Interviewing and Counseling
VII. Awareness of Emotional Problems
VIII. How To Build Employee Morale
IX. Factors Affecting Supervision

TOPIC I. THE FUNCTION OF SUPERVISION

A. Major responsibilities
   1. Planning
   2. Organizing
   3. Directing
   4. Controlling and evaluating
B. Nature of office supervision
C. Supervisory authority and responsibility
   1. Limitations on authority
      a. Decisions without approval
      b. Decisions after advice and counsel
      c. Decisions with superior's approval
      d. Decisions referred to superior
   2. Limitation on responsibility
D. Accountability for actions
E. Relationships with superiors
F. Element of risk in supervisory decisionmaking

TOPIC II. THE SUPERVISORY JOB: GENERAL RESPONSIBILITIES

A. Participating in the selection and placement of office employees
   1. Interviewing prospective employees
   2. Evaluating abilities and attitudes of prospective employees
   3. Selecting employees
B. Indoctrinating and training employees
   1. How to orient new employees
   2. How to determine training needs
   3. How to train employees
      a. Learning principles to use
      b. Teaching methods to use
C. Organizing the work of the section
D. Obtaining quality work from others
E. Developing employees' abilities and interest effectively

F. Reviewing and evaluating work performance
G. Using good human relations to develop teamwork
H. Improving work methods
I. Developing interdepartmental cooperation
J. Keeping or using personnel records
   1. Pertinent personal data
   2. Dates of employment training
   3. Attendance and vacation schedules
   4. Salaries
K. Solving problems

TOPIC III. COMMUNICATING WITH EMPLOYEES

A. Communicating changes in work method
   1. Encouraging participation in changes
   2. Notifying employees of changes contemplated by superiors or company
B. Communicating changes in policies and procedures
C. Communicating orders (direction)
D. Communicating job performance standards

TOPIC IV. ORGANIZING WORK

A. How to organize physical equipment
B. How to establish operating procedures
C. How to encourage employee participation in work organization
D. How to plan for improvement

TOPIC V. EVALUATING EMPLOYEES

NOTE: This topic is covered in depth in the Performance Standards and Employee Appraisal and Counseling units.

A. Using reasonable criteria for evaluation
   1. Behavior
   2. Attendance and punctuality
   3. Quality of work
   4. Grooming
B. Notifying employees about criteria to be used
C. Recording actions for evaluation purposes
D. Noting actions requiring discipline
E. Giving appropriate rewards

TOPIC VI. INTERVIEWING AND COUNSELING

NOTE: This topic is covered in depth in the Employee Appraisal and Counseling unit.

A. How to interview
   1. Listening skills required
   2. Directive versus nondirective approaches—appropriateness of each method
   3. Gaining agreement
B. How to counsel employees

TOPIC VII. AWARENESS OF EMOTIONAL PROBLEMS

A. Understanding employee needs
B. Understanding anxiety
C. Understanding defensive behavior
D. Recognizing need for professional counseling assistance for employees

TOPIC VIII. HOW TO BUILD EMPLOYEE MORALE

TOPIC IX. FACTORS AFFECTING SUPERVISION

A. Union agreements
B. Government requirements
C. Company policies
D. Maintenance of professional or ethical standards
E. Availability of skills
F. Personal forces at work within supervisors
   1. Value system
   2. Need for security
   3. Democratic versus autocratic approach to leadership

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

CHRUDEN, HERBERT J. AND SHERMAN, ARTHUR W. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 19[illegible].

DAVIS, KEITH. *Human Relations at Work, 2nd ed.* New York: McGraw-Hill, 1962.

DUBIN, ROBERT. *Human Relations in Administration.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

FAMULARO, J. *Supervisors in Action: Developing Your Skills in Managing People.* New York: McGraw-Hill, 1961.

HUFFMAN, HARRY; MULKERNE, DONALD J. D.; AND RUSSON, ALLIEN R. *Office Procedures and Administrations.* New York: McGraw-Hill, 1965.

LAIRD, DONALD AND LAIRD, ELEANOR. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961.

NELSON, ROGER H. *Human Relations and Office Management.* Salt Lake City: University of Utah, 1964.

NEUNER, JOHN J. W. AND KEELING, B. LEWIS. *Administrative Office Management, 5th ed.* Cincinnati: South-Western, 1966. Manual.

RUSSON, ALLIEN R. *Business Behavior.* Cincinnati: South-Western, 1965.

SFERRA, ADAM; WRIGHT, MARY ELIZABETH; AND RICE, LOUIS A. *Personality and Human Relations in Business, 2nd ed.* New York: McGraw-Hill, 1961.

PUBLIC AND COMMUNITY RELATIONS (PCR)

Functional Knowledge for: Bank Cashier, Insurance Office Manager, Account Executive, Branch Manager, Credit Analyst Chief, Property-Disposal Officer, and all Level III jobs EXCEPT Direct-Mail Specialist

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to acquaint trainees with the impact that a firm's activities may have in the immediate community and on the public at large. In large firms, public and community relations may be handled by a public or employee relations department. In smaller firms, the task of building company image and reputation may be assigned to a supervisor or administrative manager. It is assumed that trainees for whom this unit was designed will be involved, in one way or another, with how the firm is seen by various publics. Emphasis should be placed on managerial responsibility for establishing and maintaining the firm's reputation, and on how this reputation may have an effect on labor availability, wages, and potential customers. Excluding the areas of product marketing, institutional advertising, and the like, the unit concentrates on developing the trainee's awareness of the various organizational situations that come (or should be brought) to the attention of the community, the media by which effective communication can be transmitted, and the content of these communications.

Teachers should concentrate on the problem-solving aspects of the community relations tasks confronting responsible personnel. Further, trainees should be given the opportunity to discuss how they would handle problems, prepare communications for release, select communication media, and initiate the types of activities which would result in favorable community attitudes toward the firm. Teachers should evaluate trainees' contributions to group discussions, writing of press or radio releases, problem solving ability, and case analyses and reports.

Standards of Achievement

1. Demonstrate knowledge of which organizational personnel situations should be brought to the attention of community.
2. Prepare acceptable press and radio releases.
3. Demonstrate ability to select appropriate communications media for public and community relations.
4. Demonstrate knowledge of the public relations activities required of a management employee of the company.

Prerequisites for Study of Public and Community Relations

Trainee selection standards.

Topic Outline

I. Employing Organization and Public and Community Relations
II. Responsibility for Public and Community Relations
III. Situations Requiring Good Public and Community Relations
IV. Tasks in Public and Community Relations Work
V. Case Studies in Public and Community Relations
VI. Practice in Preparing Publicity Releases for Selected Mass Communication Media

TOPIC I. EMPLOYING ORGANIZATION AND PUBLIC AND COMMUNITY RELATIONS

A. Need for good employer-community relations
B. Effect of organization's employee relations activities on:
   1. Local community
   2. Nation
   3. Potential and present customer
   4. Labor availability
   5. Wages
   6. Labor organization
C. Importance of sound employee relations policies and programs

TOPIC II. RESPONSIBILITY FOR PUBLIC AND COMMUNITY RELATIONS

A. Employer as responsible principal
B. Management personnel and public relations
C. Delegation of public relations function to
   1. Public relations department
   2. Industrial or employee relations department
      a. Employee activities
      b. Labor organization activities
   3. Other management personnel
D. Personnel in organization associated with public and community relations functions
   1. Sales and marketing personnel
   2. Education and training personnel
   3. Administrative management personnel

TOPIC III. SITUATIONS REQUIRING GOOD PUBLIC AND COMMUNITY RELATIONS

A. Establishing organization image
B. Building organization morale and attitudes
C. Expanding labor supply through consistent image building
D. Overcoming adverse publicity
   1. Quality of product or service or price
   2. Labor organization activities—negotiations, contemplated strikes, etc.
   3. Activities of present employees
   4. Company policies
   5. Nature of industrial work—noise, fumes, etc.
   6. Legal actions or suits

TOPIC IV. TASKS IN PUBLIC AND COMMUNITY RELATIONS WORK

A. Effective working relationships with mass communication media personnel
   1. Newspapers
   2. Radio and television
   3. National magazines
B. Investigation activities
C. Obtaining consensus concerning direction of community relations activities
D. Presenting organization's side in controversy
   1. Clear, concise, and impactive exposition of information
   2. Reliability and truth of presented information
   3. Use of responsible spokesmen for special statements
   4. Advance preparation of organization's position in labor disputes
   5. Continuity of information
E. Handling serious accidents
F. Presenting positive image of organization
   1. Accomplishments of entire organization
   2. Accomplishments of individual employees
   3. Representative participation in community activities—vocational training, civic associations, etc.
   4. Contributions to local funds or participation in civic campaigns, education (scholarships and awards), or other activities
   5. Appearance of plant
   6. Encourage employees to join local civic groups
   7. Encourage professional employees to join and contribute to professional societies and journals
   8. Provide guest lecturers to educational institutions
   9. Open-house plant activities—tours and exhibitions
   10. "B–I–E Days," "Clergy Days," other special groups

TOPIC V. CASE STUDIES IN PUBLIC AND COMMUNITY RELATIONS

TOPIC VI. PRACTICE IN PREPARING PUBLICITY RELEASES FOR SELECTED MASS COMMUNICATION MEDIA

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

CUTLIP, S. M. AND CENTER, A. H. *Effective Public Relations, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

JACOBS, H. *Practical Publicity: A Handbook for Public and Private Workers.* New York: McGraw-Hill, 1964.

LESLY, P. (ed.). *Public Relations Handbook, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

MARSTON, J. *The Nature of Public Relations.* New York: McGraw-Hill, 1963.

NATIONAL INDUSTRIAL CONFERENCE BOARD. "A Look at the Company's Public Relations Program," *Conference Board Record.* New York: National Industrial Conference Board, Inc., August 1964.

———. "Company Social Responsibility—Too Much or Not Enough?" *Conference Board Report.* New York: National Industrial Conference Board, Inc., April 1964.

———. "Employee Participation in Community Affairs," *Business Management Record.* New York: National Industrial Conference Board, Inc., October 1963.

———. "Industry Aid to Education," *Studies in Public Affairs I.* New York: National Industrial Conference Board, Inc., 1965.

———. "Why Companies Sponsor Scholarship Plans," *Business Management Record.* New York: National Industrial Conference Board, Inc., October 1963.

STEPHENSON, H. (ed.) *Handbook of Public Relations.* New York: McGraw-Hill, 1960.

WRIGHT, T. AND EVANS, H. S. *Public Relations and the Line Manager.* New York: American Management Association, 1964.

TECHNIQUES OF MARKETING AND ADVERTISING (TMA)

Functional Knowledge for: Account Executive, Property-Disposal Officer, Branch Manager, Direct-Mail Specialist, Insurance Office Manager, Industrial Organization Manager

Hours Class: 1 hour daily

Total: 40 hours

Description and Teaching Suggestions

This unit will provide a basic working knowledge of the key functions and responsibilities in the field of marketing and advertising. It will enable trainees just entering the field or those in the lower echelons to improve their basic management skills and knowledge, whether they are employed by private companies, unions, or government agencies. Trainees should develop enough of a grasp of the areas of responsibility and directions of approach to marketing to enable them to function within a marketing department in its day-to-day operations.

This unit emphasizes general theory and concept rather than specific procedures. The variations in actual functions in consumer oriented versus industrial and service oriented functions is substantial, and an exact "how-to" approach is not feasible. Rather, this unit attempts to make the trainee knowledgeable in the basics, thereby enabling his entry into the field where the specific training will occur. To increase individual participation as well as knowledge, current practices and example problems with solutions should be a part of this course. The scope of responsibilities covered in this unit are so broad that specific details of exact functions and responsibilities are not feasible.

Standards of Achievement

1. Demonstrate knowledge of the main functions of a marketing director in relation to his company or governmental department.
2. Demonstrate knowledge of relationship of marketing to its service arms of advertising, sales promotion, and public relations.
3. Demonstrate knowledge of the functions of advertising and means of accomplishing goals.
4. Demonstrate knowledge of the functions of sales promotion and means of accomplishing goals.
5. Demonstrate knowledge of the functions of public relations and means of accomplishing goals.
6. Demonstrate knowledge of relationship between agency account executive and the marketing director and/or advertising director served by the agency.
7. Demonstrate knowledge of basic areas of marketing communications available to advertising, sales promotion, and public relations directors.
8. Know generally the interrelationships and specific responsibilities of marketing, advertising, sales promotion, public relations, and agency account executives.
9. Understand the role of the creative individual in the overall marketing communications area.
10. Demonstrate general knowledge of the role of marketing in today's business economy.

Prerequisites for Study of Marketing and Advertising

Two years of college or the equivalent in work experience in marketing, sales, or general administration—either company or government oriented.

Topic Outline

I. Marketing and Its Role in Business
II. Advertising and Its Responsibility to Marketing
III. Sales Promotion and Its Responsibility to Supplement Advertising
IV. Public Relations as a Communication Tool for Both Marketing and Overall Business or Government
V. Agency and Account Executive Responsibility to Marketing

TOPIC I. MARKETING AND ITS ROLE IN BUSINESS

A. Basic responsibility of marketing
   1. Role in overall corporate structure
   2. Relationship to sales
   3. Relationship to production
   4. Responsibilities to corporate planning
   5. Responsibilities for current and long-range corporate planning
   6. Role in corporate public communications
B. Growth of marketing responsibilities and functions in today's business and future potential
C. Marketing responsibility for directing advertising, sales promotion, and public relations activities
   1. Planning responsibility for communications direction

2. Control responsibility for corporate sales communications

D. Market research responsibility
   1. Product planning
   2. Market investigation and recommendation
   3. Corporate planning

TOPIC II. ADVERTISING AND ITS RESPONSIBILITY TO MARKETING

A. Role of advertising in marketing
   1. Advertising to promote sales
      a. National consumer magazines
      b. National trade magazines
      c. National television
      d. National radio
      e. National newspapers
      f. Local or regional consumer advertising
   2. Campaign planning and strategy for advertising program
      a. Directly related to sales goals
      b. Product or service differences as main emphasis
      c. Selection of proper media
   3. Advertising department organization and areas of responsibility
      a. Advertising director
      b. Creative staff
         (1) Copywriters
         (2) Artists
      c. Production staff
      d. Cost coordinator

B. Cooperation of advertising with sales promotion and public relations

C. Role of creative people in advertising

TOPIC III. SALES PROMOTION AND ITS RESPONSIBILITY TO SUPPLEMENT ADVERTISING

A. Stimulating consumer action
   1. Direct mail
      a. Creating mailing lists
      b. Effective use of direct mail
      c. Creation of direct mail pieces to supplement sales and advertising efforts
   2. Sales promotion at point-of-purchase
      a. Point-of-purchase display
      b. Product demonstration and sampling
   3. Importance of coordination of sales promotion goals with advertising goals

B. Sales promotion responsibility for stimulating retailer or distributor action
   1. Direct communications
      a. Direct mail
      b. Salesmen selling aids
      c. Special promotions
   2. Promotions to retailers or distributors
      a. Sales contests
      b. Special promotions

C. Sales promotion as an effective support communication tool for advertising

D. Role of creative people in sales promotion

TOPIC IV. PUBLIC RELATIONS AS A COMMUNICATION TOOL FOR BOTH MARKETING AND OVERALL BUSINESS OR GOVERNMENT

A. Public relations and marketing goals
   1. Public relations as a selling device
   2. Magazine and newspaper product releases
   3. Service releases that do a product selling job

B. Public relations as a corporate information tool
   1. Community relations programs
   2. Local, regional, and national corporate communications
   3. Individual corporate officers personal public relations programs

C. Public relations role as a service to marketing and advertising and its relationship with both

TOPIC V. AGENCY AND ACCOUNT EXECUTIVE RESPONSIBILITY TO MARKETING

A. Agency role in marketing structure
   1. Campaign planning
   2. Media planning
   3. Creative preparation
   4. Media and market research

B. Agency account executive role
   1. Representation of agency and its service to client
   2. Coordinator of agency planning efforts
   3. Responsibility for interpretation, evaluation, and recommendations on advertising campaign strategy
   4. Campaign creation direction within goals set by corporate marketing department

C. Agency account executive relation to the agency
   1. Solicitation of new accounts
   2. Service of client within the established creative goals of agency
   3. Representation of agency to the client

D. Role of agency account executive in the overall marketing advertising program

Texts and Other Teaching Materials

From the following suggested texts and materials (or equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in appendix D.

ALDERSON, WROE AND GREEN, PAUL E. *Planning and Problem Solving in Marketing*. Homewood, Ill.: Richard D. Irwin, Inc., 1964.

BOYD, HARPER W. AND WESTFALL, RALPH. *Marketing Research: Text and Cases*. Homewood, Ill.: Richard D. Irwin, Inc., 1964.

CANFIELD, BERTRAND R. *Public Relations: Principles, Cases, and Problems*. Homewood, Ill.: Richard D. Irwin, Inc., 1964.

CRANE, *Marketing Communications*. New York: John Wiley and Sons, 1965.

HEPNER, HARRY W. *Advertising—Creative Communication with Consumers, 4th ed.* New York: McGraw-Hill, 1964.

LESLY, PHILIP. *Public Relations Handbook, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

MCCARTHY, JEROME E. *Basic Marketing*. Homewood, Ill.: Richard D. Irwin, Inc., 1964.

MCNEAL, JAMES U. *Readings in Promotion Management*. New York: Appleton-Century-Crofts, 1966.

NORINE, HOWARD. *The Complete Copywriter*. New York: McGraw-Hill, 1967.

OGILVY, DAVID. *Confessions of an Advertising Man*. New York: Atheneum, 1963.

PHILLIPS, CHARLES F. *Marketing: Principles and Methods*. Homewood, Ill.: Richard D. Irwin, Inc., 1964.

SANDAGE AND FRYBURGER. *Advertising: Theory and Practice, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1963.

———. *Role of Advertising*. Homewood, Ill.: Richard D. Irwin, Inc., 1960.

USE OF CONSULTANTS (UOC)

Specialized Knowledge for: All Level III jobs and Chief Credit Analyst

Hours Class: 1 hour daily — Total: 10 hours

Description and Teaching Suggestions

In this era of specialization, with increased emphasis on efficiency, control of costs, and innovations in product development, administrators and managers depend increasingly on the use of consultants. Consultants may be employed by a firm for a variety of specialized purposes. Their fees are ordinarily higher than those paid to permanent employees. However, the obvious advantages are that little overhead is incurred during their employment, and they permit management to appear to be objective about certain types of organizational problems.

This unit is designed to show how consultants may be selected. The unit is not concerned with the choice of specific types of consultants, but rather covers the essential factors which must be considered when choosing consultants and the types of situations for which they may be employed.

The unit is presented largely by lecture, but teachers should encourage trainee discussion. Objective type tests should be used to measure the limited standards of achievement suggested for the unit.

Standards of Achievement

1. Know eight types of organizational situations for which consultants may be employed advantageously.
2. Know five factors to consider when choosing consultants.
3. Know two advantages and two disadvantages of employing consultants.

Prerequisites for Study of Use of Consultants

Trainee selection standards.

Topic Outline

I. Advantages and Disadvantages of Employing Consultants
II. Types of Problems Indicating Use of Consultants
III. Factors to Consider when Choosing Consultants
IV. Preparing Organization to Accept Consultants
V. Appraisal of Consultants' Services

TOPIC I. ADVANTAGES AND DISADVANTAGES OF EMPLOYING CONSULTANTS

A. Advantages
   1. Objectivity—not usually influenced by internal politics
   2. Short tenure of employment
   3. Specialization of work of consultant
      a. Technological skills
      b. Professional competencies
      c. Administrative
      d. Sales
   4. Education and experience required for problem solution
   5. Variety of experience with problems in different organizations

6. Time and cost savings
   a. Speed of accomplishment
   b. Noninvolvement and unhindered in pursuit of work
   c. Little or no overhead incurred

B. Disadvantages
   1. Misrepresentation by consultant
   2. Incompetency or lacking in ability
   3. Damage to interpersonal relations in organization
      a. Behavioral style
      b. Personality
      c. Inconsiderateness
   4. Opportunism of consultant defeating intent for which hired
   5. Inordinate fees
   6. Improper initial assessment of problem by consultant
   7. Lack of acceptance by organizational personnel
      a. Unnecessary time delays
      b. Noncooperation
   8. Psychological feedback of organizational personnel
      a. Implication of threat to personnel exposure
      b. Efficiency expert complex
      c. Perceived threats of loss of job
      d. Ego-deflation of personnel by implication of inadequacy in solving problem

TOPIC II. TYPES OF PROBLEMS INDICATING USE OF CONSULTANTS

A. Engineering and scientific problems
B. Personnel problems
   1. Morale
   2. Turnover
   3. Hiring
   4. Disciplinary
   5. Productivity
   6. Personnel development
   7. Others
C. Manufacturing problems
D. Administrative problems
   1. Organization
   2. Policies and procedures
   3. Financial
   4. Legal
   5. Public relations
   6. Others
E. Sales and marketing problems
   1. Market penetration
   2. Advertising
   3. Customer relations
   4. Merchandising
      a. Advertising
      b. Selling
   5. New product or service introduction
   6. Others

TOPIC III. FACTORS TO CONSIDER WHEN CHOOSING CONSULTANTS

A. Type, magnitude, and nature of problem
B. Determination of competency within organization
C. Availability of consultants in problem area
D. Qualifications of consultant
   1. Professionalism—licensing, affiliation, degrees
   2. Problem solving capability
   3. Motivation, drive, and energy
   4. Range of services provided
   5. Staffing of consultant force
      a. Education
      b. Experience in problem areas
      c. Reputation
      d. Personalities
E. Consultant fees
F. Preparation of request for proposal by company
G. Appraising quality of proposal from consultant
   1. Indication of preproposal consideration of planning to solve problem
   2. Specification of services to be provided
   3. Methodology to be used
   4. Specification of time required, products to be produced, schedule, and fees
   5. References
   6. Specification of contract and contingent arrangements
H. Consideration of other than established consultants
   1. Experience of individual consultant
   2. Appraisal of drive, intelligence, and problem solving ability
   3. Personality of individual
I. Preproposal meetings of organization staff and consultant

TOPIC IV. PREPARING ORGANIZATION TO ACCEPT CONSULTANTS

A. Pre-engagement announcement to concerned individuals in organization
   1. Meetings
   2. Memorandums

B. Explanation of extent of services to be rendered and purpose for which hired
C. Soliciting cooperation from organization staff
D. Authorization to accounting department for processing of fees
E. Establishment of reporting relationship of consultant
   1. Chief executive
   2. Department head
   3. Others

TOPIC V. APPRAISAL OF CONSULTANTS' SERVICES

A. Conduct during tenure of service
   1. Effect on organization personnel
   2. General deportment
   3. Communication ability
   4. Degree of interest shown in problem
B. Quality of service
   1. Solution offered—practicality, soundness, etc.
   2. Services rendered—feedback from affected personnel
   3. Quality of report submitted
   4. Exposing other areas requiring managerial attention
   5. Presentation of followup
C. Appraisal of initial costs and contingent arrangements versus results produced
D. Subjective versus objective appraisal of consultant services

Texts and Other Teaching Materials

In many of the basic managerial texts previously cited in other units, references are made to the use of consultants and consulting services.

RELEVANT WORK EXPERIENCE

The final training of most workers takes place on the job. The peculiarities of an individual work assignment, the particular employer, and the environmental conditions will affect final training, regardless of an individual's experience, training, or education. This training takes place either by being presented in an organized fashion or by being "picked up" by the individual through observation, experience, or trial and error. Experience has shown that good on-the-job training is a supervised activity for which there is no practical substitution. The Vocational Education Act of 1963 has provided for on-the-job experience to be given, wherever practicable, in conjunction with the vocational education program.

As funded under the act, providing trainees with work experience as part of their vocational education program may pose certain problems. In many instances, however, these problems can be overcome by the cooperation of the business community and the local educational agency.

COMMUNITY ADVISORY COMMITTEE

One method to help provide on-the-job work experience for most trainees is to establish a community advisory committee made up of employers, school counselors and administrators, local employment office officials, and teacher-coordinators. The committee should function both in an advisory capacity and as an active instrument in providing work experience opportunities to qualified trainees.

The U.S. Office of Education's pamphlet, *Organization and Effective Use of Advisory Committees* (*OE–84009*), should be helpful in establishing the community advisory committee and in suggesting ways to improve current vocational education programs. Without the willingness of local employers to hire temporary persons as trainees, some of the value of the vocational education program may be lost.

WORK EXPERIENCE REQUIREMENTS

Several sections of part 104—Administration of Vocational Education: Federal Allotments to States, Rules, and Regulations, Vocational Education Act of 1963, deal with the various types of work experience and programs that can be made available to eligible trainees. Excerpts from these pertinent sections are repeated below.

Section 104.13 (h)(5)—The program of instruction will combine and coordinate related instruction with field, shop, laboratory, cooperative work, or other occupational experience which (i) is appropriate to the vocational objective of the students, and (ii) is of sufficient duration to develop competencies necessary to fit him for employment in the occupation or occupational field for which he is being trained, and (iii) is supervised, directed, or coordinated by a person qualified under the State plan. See special requirements for classes providing cooperative work experience in §104.16.

Section 104.16—Cooperative programs. In providing cooperative work experience pursuant to §104.13 (h)(5), the State plan shall provide for cooperative programs for persons enrolled in a school who, through a cooperative arrangement between the school and employers, receive parttime vocational instruction in the school and on-the-job training through part-time employment. When vocational instruction is provided in such programs meeting the standards and requirements in §104.13, the State plan shall provide that such classes be organized through cooperative arrangements (preferably in writing) between the schools providing vocational instruction to student learners in the class and the employers providing on-the-job training through part-time employment of such student-learners. Such arrangements shall provide for (a) the employment of student-learners in conformity with Federal, State and local laws and regulations in a manner not resulting in exploitation of such student-learner for private gain, (b) an organized program of training on the job, and (c) supplemental vocational instruction in school.

Section 104.17—Business and office education. Pursuant to the general State plan requirements of vocational instruction in §104.13, the State plan shall require that instruction in business and office

occupations be provided through courses and curricula which include both the subject matter and practical experience needed in the occupations for which instruction is provided.

Section 104.25—Requirements of work-study program. The State plan shall provide that a work-study program meet the following requirements:

(a) Administration. The work-study program will be administered by the local educational agency and made reasonably available (to the extent of available funds) to all qualified youths, in the area served by such agency, who are able to meet the requirements in paragraph (b) of this section.

(b) Eligible students. Employment under the work-study program will be furnished only to a student who (1) has been accepted for enrollment or, if he is already enrolled, is in good standing and in full-time attendance as a full-time student in a program which meets the standards prescribed by the State board and the local educational agency for vocational education programs under the 1963 act; (2) is in need of the earnings from such employment to commence or continue his vocational education program; and (3) is at least fifteen years of age and less than twenty-one years of age at the date of the commencement of employment and is capable in the opinion of the appropriate school authorities of maintaining good standing in his school program while employed under the work-study program.

(c) Limitation on hours and compensation. No student will be employed more than 15 hours in any week during which classes in which he is enrolled are in session, or for compensation which exceeds $45 per month or $350 per academic year or its equivalent, unless the student is attending a school which is not within reasonable commuting distance from his house, in which case his compensation may not exceed $60 per month or $500 per academic year or its equivalent.

(d) Place of employment. Employment under work-study programs will be for the local educational agency or for some other public agency or institution (Federal, State, or local) pursuant to a written arrangement between the local educational agency and such other agency or institution, and work so performed will be adequately supervised and coordinated and will not supplant present employees of such agency or institution who ordinarily perform such work. In those instances where employment under work study programs is for a Federal agency or institution, the written arrangement between the local educational agency and the Federal agency or institution will state that students so employed are not Federal employees for any purpose.

The relevant work experience projects suggested in the *Curriculum Synopses* section of this guide should conform to the requirements of the above sections.

Work experience may be simulated or contrived, either on the job, in the educational facility, or with youth groups. To make these experiences meaningful requires coordination between teachers, school administrators, counselors, community advisory committees, youth groups, employers, or any others to whom the trainee may be assigned for supervised work activity. This cooperation should result in the proper choice of work projects to complement the training and meet the trainee's career objective. Other results should be fair evaluations of the trainee's interest, industry and performance, and adequate personal guidance.

The suggested work experience project programs that follow may be modified to suit local conditions and school facilities. These projects are grouped by type of program, locations for work experience projects and types of trainees to whom projects are applicable.

It should be remembered that the length of work experience projects will vary according to the variety of duties to which the trainee will be exposed and how long it will take to develop trainee self-confidence for entry into a regular position. *The Curriculum Synopses* section indicates time when work experience projects may begin. However, the length of time indicated is minimal. Increasing this time should be arranged between local teachers, counselors, and school administrators. As previously stated, a constant focus of attention should be on developing the trainee to meet employability standards in the occupational field.

USE OF JOB DESCRIPTIONS

The school's counselor and work experience teacher-coordinator should be thoroughly familiar with the job descriptions and prerequisites for each job so that the arranged work experience projects may include most of what the average employer will expect from the worker. The main duties of jobs have been abstracted and are shown as typical work activities later in this section. In addition, the job prerequisites should be discussed by the trainee's coordinating teacher and/or person to whom the trainee is assigned so that appropriate evaluations may be made of progress and abilities.

CONFERENCES

Throughout the relevant work experience project period, regular trainee-teacher and trainee-counselor conference periods should be scheduled. Frequent and regular conferences should also be held by the teacher or counselor with the person to whom the trainee is assigned. As a minimum, conferences should be held before the start of the work project period, at the half-way point, and toward the end of the work project period. These conferences may be for evaluation, guidance, or to assist the trainee with final placement.

SCHEDULING WORK EXPERIENCE

Because of the nature of the occupations in the supervisory and administrative management fields, assignments to relevant work experience projects must be stratified by job levels.

In Level I, with the exception of the Junior Executive and Trainee Manager jobs for which work experience assignments might be feasible, as with Levels II and III, trainees should be assigned simulated training or directed work experience projects.

TEACHER-COORDINATOR EVALUATION OF WORK EXPERIENCE

Where work experience assignments are possible, the teacher-coordinator should be constantly alert to the types of work experience being given to trainees. Often, well-intentioned employers (or their managers) will not have the time to participate actively or personally in a trainee's development. As a result, the trainee may be assigned to a supervisor who may or may not appreciate that the trainee should be given a variety of experiences rather than only a routine production task that affords little opportunity to use the trainee's developed skills. The tendency of the supervisor to be production-oriented rather than teaching-oriented should be anticipated. If this condition occurs, it is possible that a trainee's development may be hindered.

Teacher-coordinators should not only be concerned with the evaluation of the trainee while on the job, but also with the evaluation of the work experience being offered. The teacher-coordinator should request permission from the employer to discuss out-of-line trainee experience situations with supervisors or other workers in the organization to whom the trainee has been assigned. Appropriate measures should be discussed with the employer so that the trainee may be afforded the opportunities to demonstrate acquired skills and knowledge.

As has been noted above, work experience arrangements in this occupational field pose a considerable problem. Because the jobs are supervisory or administrative in character, employers will not ordinarily be inclined to assign trainees in these categories to give them experience at the expense of workers in their organization. Wherever possible, however, trainees should be afforded the opportunity to work closely with supervisory personnel as "assistants-to." The teacher-coordinator should ascertain the types of tasks being performed by those trainees in "assistant-to" positions.

SIMULATED WORK EXPERIENCE PROJECTS

When actual work experience may not be available, simulated work experience projects conducted in the school may serve as a substitute. This type of program may well be the most common. It is closer to what is being done in today's vocational schools. However, this type of training is less realistic than cooperative or directed work experience programs. Guide users should refer to the office occupations education cycle shown in *About the Curriculums* section. These projects also apply to the directed experience type of office education programs. The directed type of program seeks to combine simulated work experience projects, performed under direction of a coordinating teacher, and work experience.

The following examples, categorized by job levels, are suggested relevant work experience projects that can serve development purposes.

Level I

Job—Clerical Technician

1. Assign trainee to school administrative office (attendance, records, supplies, equipment).
2. Have trainee observe and prepare report on work flow, procedures, and functions carried out by office personnel.
3. Submit recommendations for improvements, through new forms, modifications of procedures, or some other method.
4. Choose a specific job in the office and write an applicable job description.

Level II

Job—Administrative Assistant

1. Assign trainee to office of the school principal or some other major administrator.

2. Have trainee study and prepare detailed survey of office layout to determine efficiency in terms of functions assigned to the particular office studied.
3. Conduct evaluation of workflow through a particular administrative section to determine bottlenecks, duplication of effort, or other indications of inefficient utilization of personnel.
4. Prepare release for school administrative staff interpreting a particular policy affecting day-to-day operations (may apply to personnel, purchasing, discipline, attendance, or other activity areas).
5. Develop set of performance standards for a specific staff position, selected by the trainee with the prior concurrence of the instructor and/or school administrator.

Level III

Job—Contract and Order Administrator

1. Assign trainee to school office concerned with purchasing school materials, equipment, and supplies.
2. Working with school purchasing official, prepare analysis of orders by suppliers indicating percentage of returns due to faulty or incorrect shipments, late deliveries, or other factors indicating supplier's incapability to meet commitments.
3. Prepare requests for bids to be sent to list of suppliers.
4. Prepare report for presentation to class concerning procedures followed in purchasing materials at that location.

For the purpose of this guide, the foregoing are given as *examples* of typical work experience projects. It is suggested that work experience teacher-coordinators prepare similar projects for each trainee category, utilizing the job descriptions, occupational prerequisites, and suggested training, together with occupation and training analyses as source material.

TYPICAL WORK EXPERIENCE SOUGHT

Depending on the specialization of the trainee, work experiences should include most, but not necessarily all, of the following activities:

1. Directing the activities of a working group
2. Reading incoming correspondence, extracting information, preparing replies
3. Answering relatively involved telephone inquiries in the area of his specialty and providing proper information
4. Extracting information from source materials such as reference books, catalogs, brochures, supply lists, etc.
5. Preparing policy and procedures manuals for administrative use
6. Preparing oral and written interpretations of company policy statements
7. Drawing typical organization charts of a business organization, including a detailed chart breakdown of his own area of specialization
8. Preparing a comprehensive job description of a supervisory position in an unfamiliar activity area by interviewing, recording data, and presenting it in writing in an orderly and logical fashion
9. Compiling data necessary for the preparation of an operating budget within his area of specialization
10. Presenting and explaining a company annual report
11. Designing (or modifying) an existing form for the recording or control of a functional activity within his area of specialization
12. Conducting a performance review and appraisal interview
13. Drawing a process flow chart with a detailed explanation of the steps involved
14. Preparing and presenting a speech on a topic in his particular speciality
15. Preparing graphical presentations based on statistical data
16. Determining order point levels to insure adequate inventory to meet current and future needs, based on available records and on those developed
17. Handling employee grievances, inquiries, and problems relevant to work situations
18. Preparing and conducting job training programs
19. Creating and designing a new approach for a direct-mail program, using commercially prepared advertising materials for a particular product or service
20. Designing, preparing, and presenting a community relations program to enhance the company's image locally
21. Choosing a particular product or service, preparing an analysis of the various media available for coverage (radio, television, newspaper, magazine, direct mail, etc.) and making recommendations based on appropriateness, optimum

exposure, and anticipated response or potential increase in sales

22. Preparing an analysis of a filing system in use and recommending modifications in design or procedures to improve efficiency

EVALUATION OF TRAINEE

Arrangements should be made by the teacher-coordinator with the person to whom the trainee is assigned to review items of completed work and to check trainee performance. This person should also be requested to complete a simple rating sheet on the trainee, which is to be discussed with the teacher-coordinator. The rating sheet should include such items as appearance, courtesy, ability to work well with others, office practice proficiency (applicable machines, telephone technique, dealing with visitors), adaptability, alertness, speed of comprehension, and degree of completion of assignments. Periodic teacher-trainee conferences should be held to discuss the trainee's rating and performance to identify areas which need improvement. Final trainee job readiness evaluation should be agreed upon by all concerned, including the trainee, before the final phase. Preparation for actual job seeking and placement should be started.

USEFULNESS OF YOUTH CLUBS AND ORGANIZATIONS

The value of youth groups as a complementary activity to strengthen vocational education programs has been long recognized. The youth-club program serves to round out the classroom instruction and the job instruction by providing controlled methods of trainee-centered activities which relate to the participants' career objectives.

Supervision of youth-club activities by qualified vocational education teachers assures trainees will participate in relevant work experience projects to the extent that they serve to simulate functions of business. In addition, if properly planned, youth-club activities can serve to develop attitudes of cooperation and completion, appreciation of social values and opportunities to practice communication skills, and to provide recognition of the individual for his achievement. Teacher-coordinators in their roles as advisors to the youth groups, can enhance the importance of the youth organization as an adjunctive activity for complete vocational education.

APPENDIX A—SAMPLE SUGGESTED LESSON PLAN

A good unit of instruction provides various kinds of learning activities including demonstrations, lectures, directed study, supervised practice, and examinations. These activities should be coordinated by the use of an effective teacher's lesson plan. A typical plan may include topics for presentation by lecture, motion picture or recording, individual or group activity, and formal or informal review, using discussion questions, oral examination, or written examination. Each separate activity should contribute its part to the completion of the unit. As much as possible, the lesson plan should be student-action oriented, having definite outcomes for the students in mind.

The following lesson plan illustrates suggested methods of unitizing material for class presentation under the appropriate subtopic or topic of a typical course outline. The individual teacher may modify the detail of his own personal guide as his particular experience dictates. Rigorous adherence to the format is neither suggested nor implied. It is simply an instructional aid to be used when new or infrequently occurring subject content is to be presented.

PRINCIPLES OF EFFECTIVE SUPERVISION

Lesson No. 15
Topic: Evaluating Employees
Lecture Time: 45 minutes
Discussion Time: 30 minutes
Directed Practice Time: 45 minutes

Topics

I. Definition of evaluation
II. Informal versus structured evaluation practices
  A. Informal or unstructured
    1. Truth of statement that evaluation always occurs whether or not it is recognized as such
    2. Dangers of subjective, inconsistent evaluation practices
    3. Effect on individuals evaluated
  B. Formalized or structured program
    1. Management attitudes
    2. Employee attitudes
    3. Conditioning of organization toward acceptance
    4. Maintenance of objectivity and relative depersonalization
III. Group discussion: Desirability of formal/informal programs (bring out both positive and negative features of each)
IV. Establishment of criteria for evaluation
  A. Selecting measurable, objective factors
    1. Attendance
    2. Punctuality
    3. Grooming (appropriate for job)
    4. Job performance (measurable against established standards)
      a. Quality
      b. Quantity
      c. Goal achievement
    5. Administrative ability
      a. Planning
      b. Organizing
      c. Working with and through others
      d. Cost consciousness
    6. Development of subordinates
    7. Personal qualities
      a. Cooperativeness
      b. Aggressiveness
      c. Stability
      d. Acceptance of criticism
      e. Physical stamina
  B. Clear definitions for factors selected
V. Notifying employees of criteria to be used
  A. Need for explaining objectives of program
  B. Emphasis on objectivity of criteria
  C. Assurance of feedback to individuals
  D. Advantages to employees
    1. Knowing where one stands
    2. Providing base for personal development
    3. Potential for promotion through development
  E. Assurance of universal application throughout organization
VI. Methods of recording actions for evaluation purposes
  A. Importance of overview as opposed to isolated instance notations
  B. Need for evaluation comments or ratings supported by specific observations
  C. Necessity for maintaining security of performance ratings and evaluations
  D. Establishment and maintenance of rapport through confidential handling of records and comments (both oral and written)
VII. Group discussion: How to best minimize personalities and emphasize objectivity in evaluations.

Note: If time permits, have trainees work in teams of three or four to develop an evaluation form. If time is insufficient, outside class similar homework assignment should be given. Class review of forms should precede next lesson, Interviewing and Counseling.

APPENDIX B—PHYSICAL FACILITIES

Requirements for physical facilities cannot be estimated in advance for any particular location. These requirements will be affected by trainee populations, available instructional time, and present facility adequacy. Examples of typical classroom and laboratory layouts are included for reference purposes only.

The following listings have been prepared for classes ranging from 20 to 30 trainees; they are not related to the sample layouts. If the number of trainees varies from those provided in these suggestions, necessary adjustments will have to be made locally. Similarly, no quantity is indicated for items which may vary significantly in accordance with local needs.

General Equipment

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	Tape recorder	$149–$339
1	Three-speed phonograph	25– 60
1	Overhead projector	160– 250
1	Portable flannelboard, with accessories	25– 50
1	Flip-chart easel	20– 35
1	Filmstrip projector, 35-mm	109– 159
1	Sound motion picture projector, 16-mm	600– 800
2	Projection screens	20– 43
1	Slide projector, 2 inches x 2 inches	55– 175

Office Machines Classroom

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	Unabridged English dictionary	$7– $10
1	Teacher's desk (top 32 x 54 inches) with chair	175– 225
5	Posture chairs	35– 70
5	Typing tables, adjustable from 27- to 30-inches high	13– 45
20	Trainee desks or tables 29- to 30-inches high	20– 35
20	Straight desk chairs	20– 30
6	Standard electric typewriters (one for replacement purposes)	280– 425
1	Long-carriage electric typewriter (for special use)	350– 450
1	Stencil duplicator and cabinet	80– 135
1	Fluid duplicator and cabinet	100– 150
1	Photo-copy duplicator	179– 550
1	Key-driven calculator (electric)	165– 550

[1] Prices quoted as of January 1, 1967.

General Room

Quantity	Description	Estimated price range per unit (excluding tax)[1]
2	10-foot chalk boards	$70– $80
1	Teacher's desk (top 32 x 54 inches) with chair	225– 275
30	Straight desk chairs	20– 30
30	Trainee desks or tables, 29- and 30-inches high	20– 35
2	Filing cabinets (18 x 36 inches)	40– 60
1	Bookcase or open bookshelves	40– 50
	Miscellaneous (trays, stapler, etc.)	

Conference Room

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	12-foot conference table	$250–$350
12	Straight desk chairs	20– 30
1	10-foot chalk board	70– 80

[1] Prices quoted as of January 1, 1967.

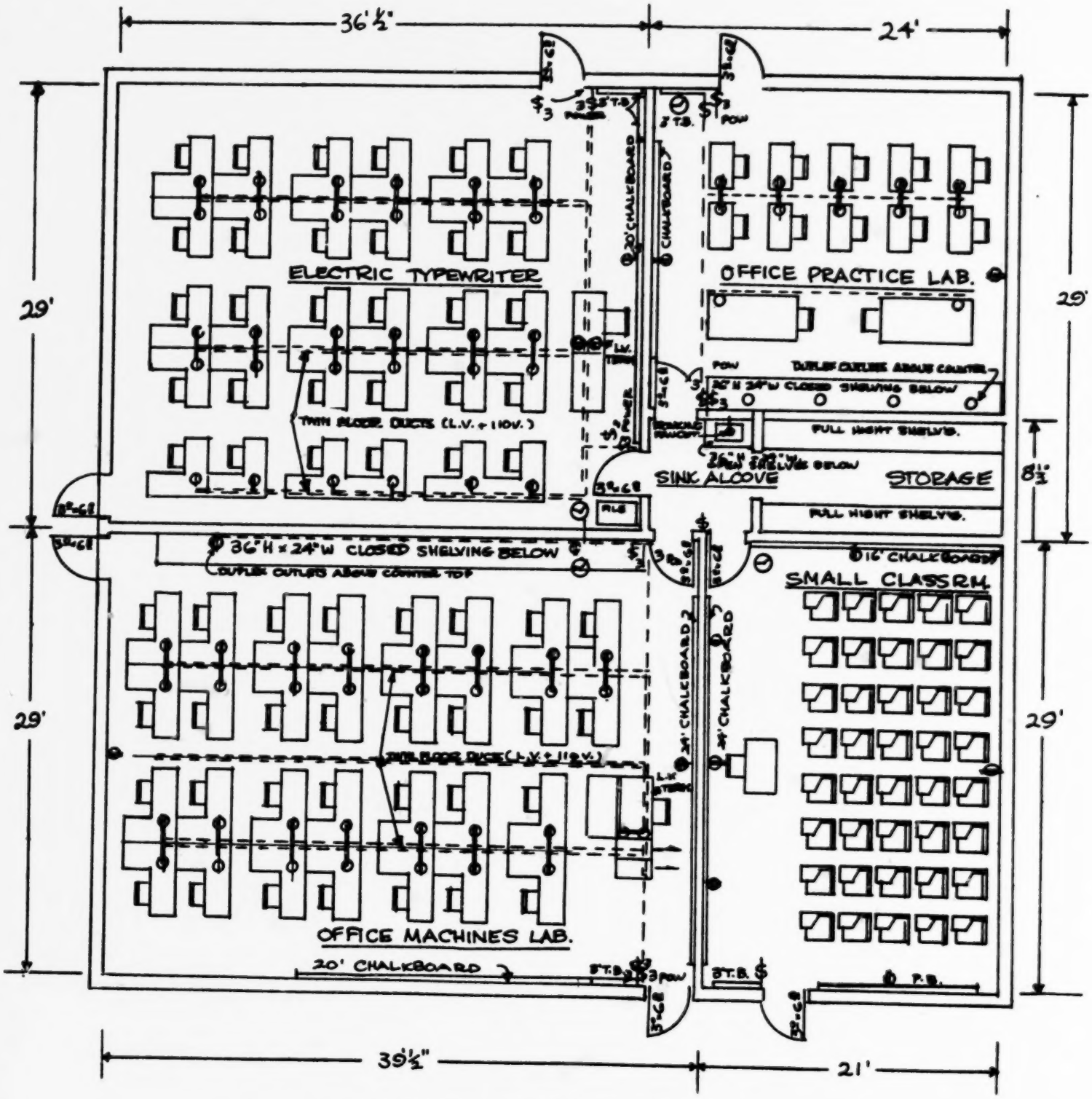

Figure 1—Typical Facility Layout.
Adapted and modified from DeAnza College layout. Courtesy: California State Department of Education

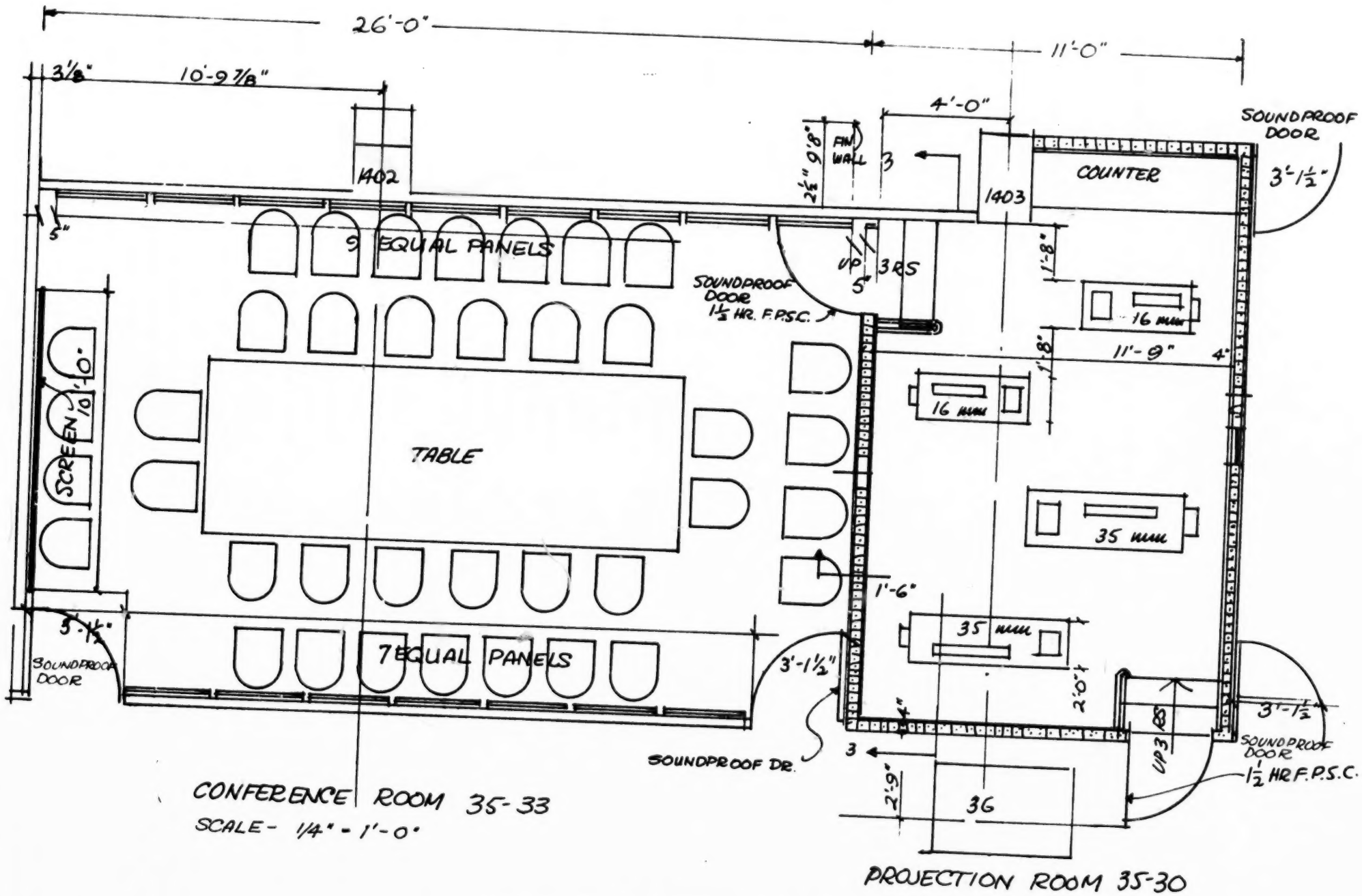

Figure 2—Typical Conference Room Layout.
(For conference room for American Broadcasting Company)
Courtesy of Industrial Photography, United Business Publications, Inc.

APPENDIX C—SOURCES OF EDUCATIONAL MATERIALS

Materials listed in this guide may be obtained from the sources listed below. While some of these sources may not have been referred to elsewhere, all provide teaching materials of varying kinds.

Addison-Wesley Publishing Co., Inc., Reading, Mass. 01867
Administrative Management Society, Willow Grove, Pa. 19090
Allyn & Bacon, Inc., 150 Tremont St., Boston, Mass. 02111
American Association of Industrial Management/NMTA, 60 E. 42 St., New York, N.Y. 10017
American Bankers Association, 12 E. 36 St., New York, N.Y. 10016
American Bar Association, 115 E. 60 St., Chicago, Ill. 60637
American Business, 4660 Ravenswood Ave., Chicago, Ill. 60640
American Data Processing, Inc., 2200 Book Tower, Detroit, Mich. 48226
American Economic Foundation, 51 E. 42 St., New York, N.Y. 10017
AFL–CIO, Department of Education, 815 16 St., N.W., Washington, D.C. 20036
American Foundation on Automation and Employment, 280 Park Ave., New York, N.Y. 10017
American Management Association, 135 W. 50 St., New York, N.Y. 10020
American Personnel and Guidance Association, 1605 New Hampshire Ave., N.W., Washington, D.C. 20009
American Psychological Association, 17 St. & Rhode Island Ave., N.W., Washington, D.C. 20036
American Society for Personnel Administration, 52 E. Bridge St., Berea, Ohio 44017
American Society for Training and Development, 313 Price Pl., P.O. Box 5307, Madison, Wis. 53705
American Statistical Association, 810 18 St., N.W., Washington, D.C. 20036
American Technical Society, 848 E. 58 St., Chicago, Ill. 60637
Appleton-Century-Crofts, Inc., 34 W. 33 St., New York, N.Y. 10015
Argyle Publishing Corp., 200 Madison Ave., New York, N.Y. 10016
Art Metal Construction Co., Jamestown, N.Y. 14701
Assignments in Management, 307 Swiftwater Lane, Chester, Pa. 19015
Association of American Railroads, Transportation Bldg., 17 and H Sts., N.W., Washington, D.C. 20037
Association Films, 347 Madison Ave., New York, N.Y. 10017
Association Press, 291 Broadway, New York, N.Y. 10007
Atheneum Publishers, 162 E. 38 St., New York, N.Y. 10016
Audio Productions, Inc., 630 Ninth Ave., New York, N.Y. 10036
Audio-Visual Research, 523 S. Plymouth Ct., Chicago, Ill. 60605
Brooking, Institution, The, 1775 Massachusetts Ave., N.W., Washington, D.C. 20036
Brooklyn Law Review, 375 Pearl St., Brooklyn, N.Y. 11201
Brown Book Co., William C., 135 S. Locust St., Dubuque, Iowa 52002
Bullinger's Guides, Inc., 63 Woodland Ave., Westwood, N.J. 07675
Bureau of Apprenticeship and Training, Dept. of Labor, 1730 M St., N.W., Washington, D.C. 20036
Bureau of Industrial Relations, University of Michigan, Ann Arbor, Mich. 48104
Bureau of National Affairs, Inc., 1231 24 St., N.W., Washington, D.C. 20037
Business Horizons, Graduate School of Business, Indiana University, Bloomington, Ind. 47401
Business Press, 288 Park Ave., W., Elmhurst, Ill. 60126
Business Screen Magazines, 7064 Sheridan Rd., Chicago, Ill. 60626
Cadmus, Wesley S., 51 Fenwick St., Hartford, Conn. 06114
California Institute of Technology, Industrial Relations Center, Pasadena, Calif. 91109
Callaghan & Co., Mundelein, Ill. 60060
College of Advanced Traffic, 22 W. Madison St., Chicago, Ill. 60602
College Entrance Book Co., 104 Fifth Ave., New York, N.Y. 10011
College Placement Council, Inc., 35 E. Elizabeth Ave., Bethlehem, Pa. 18018
Commerce Clearing House, Inc., 212 N. Michigan Ave., Chicago, Ill. 60601
Continental Film Productions Corp., 2320 Rossville Blvd., Chattanooga, Tenn. 37408
Cornell University, New York State School of Industrial and Labor Relations, Ithaca, N.Y. 14850
Coronet Instructional Films, 65 E. S. Water St., Chicago, Ill. 60601
Dartnell Corporation, 4660 Ravenswood Ave., Chicago, Ill. 60640
Data Processing Management Association, 524 Busse Hiway, Park Ridge, Ill. 60068
Devin-Adair Co., The, 23 E. 26 St., New York, N.Y. 10010
Dick Co., A. B., 5700 W. Touhy Ave., Chicago, Ill. 60648
Ditto, Inc., Harrison at Oakley Blvd., Chicago, Ill. 60612
Dukane Corporation, St. Charles, Ill. 60174
Dun & Bradstreet Publications Corporation, 99 Church St., New York, N.Y. 10007
Educational Developmental Laboratories, Division of McGraw-Hill, Inc., E. Pulaski Rd., Huntington, L.I., N.Y. 11743
Educational Screen, Inc., 2000 Lincoln Park W., Chicago, Ill. 60614
Entelek, Inc., 42 Pleasant St., Newburyport, Mass. 01950

Executive Development Corp., Inc., Rockefeller Center, 630 Fifth Ave., New York, N.Y. 10020
Executive Development, Inc., 155 N. LaPeer Dr., Los Angeles, Calif. 90048
Express Audit Co., 56 Washington Ave., Providence, R.I. 02905
Film Council of America, 600 Davis St., Evanston, Ill. 60201
Film News Co., World Press Center, 54 W. 40 St., New York, N.Y. 10018
Filmstrip-of-the-Month-Club, 355 Lexington Ave., New York, N.Y. 10017
Follett Publishing Co., 1010 W. Washington Blvd., Chicago, Ill. 60607
Free Press of Glencoe, 60 Fifth Ave., New York, N.Y. 10011
Gellert Publishing Co., R. M., 33 W. 60 St., New York, N.Y. 10023
General Services Administration, Washington, D.C. 20405
Geyer-McAllister, 212 Fifth Ave., New York, N.Y. 10010
Ginn & Co., Statler Office Bldg., Boston, Mass. 02117
Gryphon Press, Highland Park, N.J. 08904
Harcourt, Brace, & World, 757 Third Ave., New York, N.Y. 10017
Harper & Bros. (See Harper & Row)
Harper & Row, Publishers, 49 E. 33 St., New York, N.Y. 10016
Harvard Business Review, Soldiers Field, Boston, Mass. 02163
Harvard Law Review, Soldiers Field, Boston, Mass. 02163
Harvard University, Graduate School of Business Administration, Soldiers Field, Boston, Mass. 02163
Harvard University Press, Soldiers Field, Boston, Mass. 02163
Health Insurance Institute, 277 Park Ave., New York, N.Y. 10017
Heath & Co., D. C., 285 Columbus Ave., Boston, Mass. 02116
Henry Holt (See Holt, Rinehart, & Winston)
Holt, Rinehart, & Winston, Inc., 363 Madison Ave., New York, N.Y. 10017
Hopkins Press, Johns, Johns Hopkins University, Baltimore, Md. 21218
Houghton Mifflin Co., 2 Park St., Boston, Mass. 02108
Industrial Education Films, Inc., 195 Nassau St., Princeton, N.J. 08540
Industrial Education Institute, Cahners Bldg., 221 Columbus Ave., Boston, Mass. 02116
Industrial Relations Newsletter, Inc., 230 W. 41 St., New York, N.Y. 10036
Institute of Industrial Relations, University of California, Los Angeles, Calif. 90024
Institute of Labor and Industrial Relations, University of Illinois, Champaign, Ill. 61822
Insurance Information Institute, 110 William St., New York, N.Y. 10033
International Correspondence Schools, Scranton, Pa. 18515
Irwin, Inc., Richard D., 1818 Ridge Rd., Homewood, Ill. 60430
Keystone View Co., Meadville, Pa. 16335
Lafayette Instrument Co., Lafayette, Ind. 47906
LaSalle Extension University, Book Publishing Div., 417 S. Dearborn St., Chicago, Ill. 60605
Leadership Resources, Inc., 1750 Pennsylvania Ave., N.W., Washington, D.C. 20006
Leonard & Co., G. R., 79 Madison Ave., New York, N.Y. 10016
Little, Brown, and Company, 200 West St., Waltham, Mass. 02154
Lord Baltimore Press, The, 220 East 42 St., New York, N.Y. 10017
Los Angeles Institute of Industrial Relations, University of California, Los Angeles, Calif. 90024
Lyons and Carnahan, 2500 Prairie Ave., Chicago, Ill. 60616
Macmillan Co., 60 Fifth Ave., New York, N.Y. 10011
Management Education Association, 2003 33 St., Seattle, Wash. 98144
Management Information Center, Inc., P. O. Box 263, Deerfield, Ill. 60015
Management Magazines, Inc., 22 W. Putman Ave., Greenwich, Conn. 06830
Marquette University, Management Center, Milwaukee, Wis. 53233
Materials for Learning, Inc., 1376 Coney Island Ave., Brooklyn, N.Y. 11230
McGraw-Hill, Inc., 330 W. 42 St., New York, N.Y. 10036
Merriam Co., G. & C., 47 Federal St., Springfield, Mass. 01105
Modern Talking Picture Service, 1212 Ave. of the Americas, New York, N.Y. 10036
National Association of Manufacturers, 277 Park Ave., New York, N.Y. 10017
National Audio-Visual Association, 3150 Spring St., Fairfax, Va. 22030
National Business Education Association, 1201 16 St., N.W., Washington, D.C. 20036
National Education Association, 1201 16 St., N.W., Washington, D.C. 20036
National Industrial Conference Board, Inc., 460 Park Ave., New York, N.Y. 10022
National Motor Freight Traffic Assn., 1616 P St., N.W., Washington, D.C. 20036
National Safety Council, 425 N. Michigan Ave., Chicago, Ill. 60611
National Schools Committee (See American Economic Foundation)
NET Film Service, Audio-Visual Center, Indiana University, Bloomington, Ind. 47401
Office Publications, 60 E. 42 St., New York, N.Y. 10017
Ohio State University Publications, 242 W. 18 Ave., Columbus, Ohio 43210
Oxford Book Co., Inc., 71 Fifth Ave., New York, N.Y. 10003
Oxford University Press, 417 Fifth Ave., New York, N.Y. 10016
Pennsylvania State University, University Park, Pa. 16802
Perceptual Development Laboratories, 6767 Southwest Ave., St. Louis, Mo. 63143
Personnel Administration, 5506 Connecticut Ave., N.W., Washington, D.C. 20008
Personnel Journal, Inc., The, P. O. Box 239, Swarthmore, Pa. 19081
Personnel Management Abstracts, P. O. Box 71, Benjamin Franklin Station, Washington, D.C. 20044
Pitman Publishing Corp., 2 W. 45 St., New York, N.Y. 10036
Practical Lawyer, The, American Law Institute, 133 S. 36 St., Philadelphia, Pa. 19104
Prentice-Hall, Inc., Route 9W, Englewood Cliffs, N.J. 07632
Railway Express Agency, Inc., 219 E. 42 St., New York, N.Y. 10017
Regnery Co., Henry, 114 W. Illinois St., Chicago, Ill. 60610
Research Institute of America, Inc., 589 Fifth Ave., New York, N.Y. 10017
Ronald Press Co., The, 15 E. 26 St., New York, N.Y. 10010
Roundtable Productions, Inc., 321 S. Beverly Dr., Beverly Hills, Calif. 90212

Rowe Co., H. M., 624 N. Gilmor St., Baltimore, Md. 21217
Royal McBee Corp., 850 Third Ave., New York, N.Y. 10022
Rutgers Law Review, Rutgers University, New Brunswick, N.J. 08903
Science Research Associates, 259 E. Erie St., Chicago, Ill. 60611
Scribner & Sons, Chas., 597 Fifth Ave., New York, N.Y. 10017
Society for Advancement of Management, 74 Fifth Ave., New York, N.Y. 10011
Society for Personnel Administration, 5506 Connecticut Ave., N.W., Washington, D.C. 20008
Society for Visual Education, 1345 Diversey Pkwy., Chicago, Ill. 60614
Somerset Press, 36 Main St., Somerville, N.J. 08876
South-Western Publishing Co., Inc., 5101 Madison Rd., Cincinnati, Ohio 45227
Systems, 315 Fourth Ave., New York, N.Y. 10010
Systems and Procedures Assn., 7890 Brookside Dr., Cleveland, Ohio 44138
Temple Law Quarterly, Temple University, 1830 N. Park Ave., Philadelphia, Pa. 19122
Trade Service Publications, Inc., 2720 Beverly Blvd., Los Angeles, Calif. 90057
Uniform Classification Committee, 516 W. Jackson St., Chicago, Ill. 60606
U.S. Chamber of Commerce, 1615 H St., N.W., Washington, D.C. 20066
U.S. Civil Service Commission, 1900 E. St. N.W., Washington, D.C. 20415
U.S. Dept. of Commerce Clearinghouse, Springfield, Va. 22151
U.S. Dept. of Health, Education, & Welfare, 330 Independence Ave., S.W., Washington, D.C. 20201
U.S. Dept. of Labor, Bureau of Labor Statistics, Washington, D.C. 20210
U.S. Employment Service, 555 Pennsylvania Ave., N.W., Washington, D.C. 20001
U.S. Government Printing Office, N. Capital between G & H Sts., N.W., Washington, D.C. 20402
U.S. National Labor Relations Board, 1717 Pennsylvania Ave., N.W., Washington, D.C. 20006
U.S. National Mediation Board, 1230 16 St., N.W., Washington, D.C. 20036
University Microfilms, 313 N. First St., Ann Arbor, Mich. 48104
University of Alabama Press, Birmingham, Ala. 35233
University of California, Los Angeles, Calif. 90024
University of California Extension, Media Center, Berkeley, Calif. 94720
University of Chicago, Chicago, Ill. 60637
University of City of Los Angeles Law Review, Los Angeles, Calif. 90029
University of Illinois, Urbana, Ill. 61803
University of Kansas City, 5100 Rockhill Rd., Kansas City, Mo. 64110
University of Michigan Press, Ann Arbor, Mich. 48104
University of Missouri, Columbia, Mo. 65201
University of Pennsylvania Law Review, 3400 Chestnut St., Philadelphia, Pa. 19104
University of Texas, Hogg Foundation, Austin, Texas 78712
University of Utah, 1400 E. Second St., S., Salt Lake City, Utah 84112
University of Wisconsin School of Commerce, Center for Productivity Motivation, Madison, Wis. 53706
Vanderbilt Law Review, Vanderbilt University, Nashville, Tenn. 37203
Van Nostrand Co., Inc., D., 120 Alexander St., Princeton, N.J. 08540
Viking Press, The, 625 Madison Ave., New York, N.Y. 10022
Virginia Law Review, University of Virginia, Charlottesville, Va. 22901
Visual Aids Service, University of Illinois, Champaign, Ill. 61803
Wadsworth Publishing Co., 10 Davis Dr., Belmont, Calif. 94002
Wiley & Sons, John, 440 Fourth Ave., New York, N.Y. 10016
World Publishing Co., 119 W. 57 St., New York, N.Y. 10017
Yale Law Journal, Yale Law Journal Co., Drawer 401A, Yale Station, New Haven, Conn. 06520
Yale University Press, 92A, Yale Station, New Haven, Conn. 06711

APPENDIX D—OTHER INSTRUCTIONAL AND REFERENCE MATERIALS

The following instructional materials may not have been previously listed under study units. They are listed here to assist teachers to locate quickly materials appropriate to the various curriculums subject areas, such as texts, references, films, filmstrips, periodicals, guides, directories, and tests. Addresses for suppliers will be found in appendix C.

TEXTS AND REFERENCES

Business Principles and Organization

Aberle, J. W.; Sielaff, T. J.; and Mayer, F. L. *General Business for Today and Tomorrow.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

Fisch, G. G. and Ross, P. S. *Organization for Profit.* New York: McGraw-Hill, 1964.

Lynn, R. A. *Basic Economic Principles.* New York: McGraw-Hill, 1965.

McNaughton, W. L. *Introduction to Business Enterprise.* New York: John Wiley and Sons, 1960.

Reed, C. A.; Concover, H. H.; and Stearns, R. E. *Introduction to Business.* Boston: Allyn and Bacon, 1958.

Communication

American Management Association. *Prime: How to Say What You Mean.* New York: American Management Association, 1963.

American Management Association. *Prime V: Basic Skills in Communication.* New York: American Management Association, 1963.

Marting, Elizabeth; Finley, Robert E.; and Ward, Ann. *Effective Communication on the Job, rev. ed.* New York: American Management Association, 1963.

Morgan, John S. *Getting Across to Employees: A Guide to Effective Communication on the Job.* New York: McGraw-Hill, 1964.

Data Processing

Arnold, R. R.; Hill, H. C.; and Nichols, A. V. *Introduction to Data Processing.* New York: John Wiley and Sons, 1966. Instructor's Manual.

Lazzaro, Victor. *Systems and Procedures.* Englewood Cliffs, N.J.: Prentice-Hall.

Industrial Psychology

Bellows, Roger M. *Psychology of Personnel in Business and Industry, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

Bennis, Warren G. *Changing Organizations: Essays on the Development and Evolution of Human Organization.* New York: McGraw-Hill, 1966.

Blake, R.; Shepard, W.; and Mouton, J. *Managing Intergroup Conflict.* Houston: Gulf Publishing, 1966.

Hacon, R. J. *Conflict and Human Relations.* New York: Pergamon Press, 1967.

Haire, Mason. *Psychology in Management.* New York: McGraw-Hill, 1961.

Heckman, S. G. and Huneryager, S. G. *Human Relations in Management.* Cincinnati: South-Western, 1960.

McGregor, Douglas. *The Human Side of Enterprise.* New York: McGraw-Hill, 1960.

Sayles, L. R. and Strauss, G. *Human Behavior in Organizations.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

Schein, Edgar H. *Organizational Psychology.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

Smith, Henry Clay. *Sensitivity to People.* New York: McGraw-Hill, 1966.

Tannenbaum, Robert and Massarik, Fred. *Leadership: A Frame of Reference.* Los Angeles: Los Angeles Institute of Industrial Relations, University of California, 1965.

Insurance

Crist, G. W., Jr. *Corporate Suretyship, 2nd ed.* New York: McGraw-Hill, 1960.

Elliott, Curtis M. *Prosperity and Casualty Insurance.* New York: McGraw-Hill, 1960.

Factory Mutual System. *Handbook of Industrial Loss Prevention, 2nd ed.* New York: McGraw-Hill, In Press.

National Industrial Conference Board, Inc., *Business Interruption.* New York: National Industrial Conference Board, 1966.

White, A. Sandri. *Insurance Claims—Investigation and Adjusting.* Allenhurst, N.J.: Aurea Publications, 1965.

———. *Insurance Principles for Agents and Managers.* Allenhurst, N.J.: Aurea Publications, 1965.

Labor Agreements

Mabry, B. D. *Cases in Labor Relations and Collective Bargaining.* New York: Ronald Press, 1966.

———. *Labor Relations in Collective Bargaining,* New York: Ronald Press, 1966.

Labor Organization and Labor Relations

Harris, Philip. "The arbitration process and the disciplining of supervisors," *Labor Law Journal,* 16. Chicago: Commerce Clearing House, Inc., November 1965.

Marting, Elizabeth (ed.). *Understanding Collective Bargaining: The Executive's Guide.* New York: American Management Association, 1958.

Meyers, J. and Laidler, H. W. *What Do You Know About Labor?* New York: The John Day Co., 1965.

Management Development

American Foundation on Automation and Employment. *Automation and the Middle Manager,* New York: American Foundation on Automation and Employment, 1966.

Merrill, Harwood F. and Marting, Elizabeth. *Developing Executive Skills: New Patterns for Management Growth.* New York: American Management Association, 1958.

Oncken, William, Jr. *A New Approach to Corporate Organization Planning and Development.* Pasadena, Calif.: Industrial Relations Center, California Institute of Technology, 1965.

Roy, Robert H. *The Administrative Process.* Baltimore, Md.: The Johns Hopkins Press, 1958.

Office Machines

Keelon, John K. *Tested Problems for Calculators and Listing Machines.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

National Office Management Association. *Practical Office Time Savers.* Vol. II. New York: McGraw-Hill, 1947.

Richards, William A. and Woodward, Robert. *Duplication Do's and Dont's.* Portland, Ore.: Allied Publishers, 1959.

Straub, Laura Lynn and Gibson, E. Dana. *Liquid Duplicating Systems.* Dubuque, Iowa: William C. Brown Co., 1960

Waltz, Loren E. *Problems in Office Services.* Bloomington, Ind.: Bureau of Business Research, School of Business, Indiana University, 1958.

Performance Standards

Batten, J. D. *Beyond Management by Objectives.* New York: American Management Association, 1967.

McConkey, Dale D. *How to Manage by Results.* New York: American Management Association, 1965.

Miller, Ernest C. *Objectives and Standards: An Approach to Planning and Control.* New York: American Management Association, 1966.

Personnel Management

Argyris, Chris. *Integrating the Individual and the Organization.* New York: John Wiley and Sons, 1965.

Burtt, Harold. *Principles of Employment Psychology.* New York: Harper, 1959.

Heyel, Carl. *How to Achieve Effective Line-Staff Team Work.* Chester, Pa.: Brookhaven, 1966.

Sutermeister, Robert A. *People and Productivity.* New York: McGraw-Hill, 1965.

Training

Bradford, L. P. (ed.). *Human Forces in Teaching and Learning.* Washington: National Education Association, 1961.

Brookhaven. *How To Get More Out of Training Conferences.* Chester, Pa.: Brookhaven, 1966.

McGehee, William and Thayer, Paul. *Training in Business and Industry.* New York: John Wiley and Sons, 1961.

Stokes, Paul M. *Total Job Training: A Manual for the Working Manager.* New York: American Management Association, 1966.

Wilson, Howard. *Employee Training and Development.* Chicago: Administrative Research Association, 1960.

PERIODICALS, GUIDES, AND DIRECTORIES

It is suggested that the teacher become acquainted with some of the following materials. Their contents are both specific and general, and may be applicable to several areas of education in the occupational field covered by this guide. The list is not to be considered exhaustive. Many periodicals, guides, and directories are listed in several of the indexes mentioned below.

Administrative Management. Geyer-McAllister

Advanced Management. Society for Advancement of Management

American Business. American Business

American Economic Review. American Economic Review, Northwestern University

An Annotated Bibliography of Industrial Relations and the Small Firm. State School of Labor and Industrial Relations, Cornell University

Audio-Visual Catalog, 1962. Materials for Learning, Inc.

Audio-Visual Communication Review. National Education Association

Audio-Visual Communications. United Business Publications

Audio-Visual Equipment Directory, 12 ed. National Audio-Visual Association

Audio-Visual Instruction. Dept. of Audiovisual Instruction, National Education Association

Automation. Penton Publication

Bibliography: Communications with Employees. A. G. Bush Library, Industrial Relations Center, University of Chicago

Blue Book of Audio-Visual Materials. Educational Screen

BNA Personnel Policies Forum. Bureau of National Affairs, Inc.

Business Education World. McGraw-Hill

Business Horizons. Indiana University

Business Management. Management Magazines, Inc.

Business Newsmagazine. Alsen Publishing Co.

Business Screen. Business Screen Magazines

Business Teacher. McGraw-Hill

Catalogue of Educational Films, 1962. Visual Aids Service, University of Illinois

Check List of All Available Teaching Aids. Prentice-Hall

Collective Bargaining Negotiations and Contracts. Bureau of National Affairs, Inc.

Conference Board Record. National Industrial Conference Board

Data Processing for Management. American Data Processing, Inc.

Dictionary of Occupational Titles, 3rd ed. U.S. Employment Service

Directory of Films About Property, Casualty and Surety Insurance. Insurance Information Institute

Directory of Home-Study Schools. R. M. Gellert-Wolfman Publishing Co.

Dun's Review and Modern Industry. Dun & Bradstreet Publications Corporation

Educational Screen and Audiovisual Guide. Educational Screen, Inc.

Educators Guide to Free Films. Educators Progress Service, Dept. AVG

Educators' Guide to Free Filmstrips. Educators Progress Service, Dept. AVG

Educators' Guide to Free Slidefilms. Educators Progress Service, Dept. AVG

Educators' Guide to Free Tapes. Educators Progress Service, Dept. AVG

Employment Relations Abstracts. Information Service, Inc.

Factory Management and Maintenance. McGraw-Hill

Fair Employment Practices. Bureau of National Affairs
Film Guide for Industrial Training. Research Service
Fortune. Time, Inc.
Guide to Civil Rights Act of 1964. Labor Relations Dept., U.S. Chamber of Commerce
Guide to Film Services of National Associations, A, 1964. Film Council of America
Guides to Newer Educational Media: Films, Filmstrips, Phonorecords, Radio, Slides, and Television, 1961. American Library Association
Harvard Business Review. Harvard University
Harvard Law Review. Harvard University
Impact of Office Automation in the Insurance Industry (*Bulletin No. 1468*). U.S. Dept. of Labor
Index of NICB Publications, 1966. National Industrial Conference Board
Index to Labor Union Periodicals. Bureau of Industrial Relations, Graduate School of Business Administration, University of Michigan
Industrial and Labor Relations Review. New York State School of Industrial and Labor Relations, Cornell University
Industrial Relations Bibliographies: A Check List. Institute of Labor and Industrial Relations, University of Illinois
Industrial Workers: Health, Hygiene, Safety, Compensation. Supt. of Documents, U.S. Government Printing Office
Inplant Food Management. Inplant Publishing Corporation
Journal of the American Society of Training Directors. American Society of Training Directors
Journal of the American Statistical Association. American Statistical Association
Labor Relations Reference Manual. Bureau of National Affairs, Inc.
Labor Relations Reporter. Bureau of National Affairs, Inc.
Labor Views on Current Issues. Institute of Labor Studies
Literature of Executive Management. Special Library Association
Management Methods. Management Magazines, Inc.
Management News. American Management Association
Management Record. National Industrial Conference Board
Management Review. American Management Association
Manager's Letter. American Management Association
Modern Office Procedures. Industrial Publishing Corporation
Monthly Labor Review. Bureau of Labor Statistics, U.S. Dept. of Labor
Nations Business. U.S. Chamber of Commerce
Occupational Outlook Handbook, 1966 (*Bulletin No. 1450*). U.S. Bureau of Labor Statistics
Office Executive. National Office Management Association
Office, The. Office Publications
Pensions and Profit Sharing. Prentice-Hall
Personnel. American Management Association
Personnel Administrator, The. American Society for Personnel Administration
Personnel Management Abstracts. Personnel Management Abstracts
Personnel Policies and Practices. Prentice-Hall
Personnel Procedure Manuals, A Research Report from the Conference Board. National Industrial Conference Board
Quarterly Journal of Economics. Harvard University Press
Reproduction Methods for Business and Industry. R. M. Gellert-Wolfman Publishing Co.
Selected Bibliography on Automation. Bureau of Labor Statistics, U.S. Dept. of Labor
Studies in Personnel Policy. National Industrial Conference Board
Supervisory Management. American Management Association
Systems. Systems
Training and Education for Manpower Development: An Annotated Bibliography, 1965. Cornell University
Training in Business and Industry. Gellert Publishing Corp.
University of Chicago Law Review. University of Chicago
U.S. Government Films for Public Educational Use—1963 (*OE-34006-63, Circular No. 742*). U.S. Government Printing Office.
Visual Aids for Business and Economic Education, rev. 1961 (*Monograph 92*). South-Western
What's New in Supervision? California State Library
Yale Law Journal. Yale University Press

FILMS AND FILMSTRIPS

NOTE: The following abbreviations are used for film and filmstrip descriptions.

BW—Black and white
Col—Color
FS—Filmstrip
min.—Running time in minutes
MP—Motion picture
Si—Silent
So—Sound

Accounting and Calculating Machines. MP–So–BW–12 min. Teaching Aids Exchange
A Good Beginning. MP–So–Col–11 min. Bureau of National Affairs, Inc.
All I Need Is a Conference. MP–So–BW–28 min. H. Strauss & Co.
Are You Listening? MP–So–BW–12.5 min. H. Strauss & Co.
As Others See Us. MP–So–BW–10 min. British Information Service
Automation. A CBS NEWS "See it Now" Production. MP–So–BW–84 min. McGraw-Hill
Avoiding Communications Breakdown. MP–So–Col–24 min. Bureau of National Affairs, Inc.
Banks and Credit. MP–So–BW–10 min. Coronet Instructional Films
Breaking the Delegation Barrier. MP–So–Col/BW–30 min. Roundtable Films
Changing Attitudes Through Communication. MP–So–Col–24 min. Bureau of National Affairs, Inc.
Communication Feedback. MP–So–Col–24 min. Bureau of National Affairs, Inc.
Communicating Management's Point of View. MP–So–Col–24 min. Bureau of National Affairs, Inc.
Credit. MP–So–Col–15 min. Audio Productions
Effective Listening. MP–So–BW–15 min. McGraw-Hill
Eight Parts of a Business Letter. MP–So–Col/BW–11 min. Coronet Instructional Films
Emergent Management. MP–So–BW–29 min. University of California Extension
Examining the Will to Work. Slidefilm–So–Col–14 min. H. Strauss & Co.
Executive Development Program. 12FS–So–Col–20 min. Executive Development, Inc.
Filing Procedures in Business. MP–So–Col/BW–11 min. Coronet Instructional Films
Follow the Leader. MP–So–Col–11 min. H. Strauss & Co.
Fundamentals of English Series. 6 FS–Si–Col. McGraw-Hill

Fundamentals of Public Speaking. MP–So–BW/Col–11 min. Coronet Instructional Films

How to Be a Good Guy. MP–So–BW/Col–22 min. Roundtable Films

How to Give and Take Instructions. MP–So–Col/BW–10 min. Coronet Instructional Films

How to Judge Facts. MP–So–BW/Col–11 min. Coronet Instructional Films

How to Succeed in the People Business. MP–So–BW–30 min. Dartnell Corp.

Human Nature and Organizational Realities. MP–So–Col–28 min. Bureau of National Affairs, Inc.

I Just Work Here. MP–So–BW/Col–17 min. Roundtable Films

Instructions or Obstructions. MP–So–Col–11 min. Bureau of National Affairs, Inc.

Is There Communication When You Speak? MP–So–Col/BW–17 min. McGraw-Hill

The Inner Man Steps Out. MP–So–BW–35 min. H. Strauss & Co.

Learn To Argue Effectively. MP–So–BW/Col–11 min. Coronet Instructional Films

Listen, Please. MP–So–Col–11 min. Bureau of National Affairs, Inc.

Man the Manager. MP–So–Col–14 min. H. Strauss & Co.

Man the Manager—Case Histories. 3MP–So–BW–2 to 3 min. each. H. Strauss & Co.

Manager Wanted. MP–So–BW/Col–29 min. Roundtable Films

Meanings Are in People. MP–So–Col–24 min. Bureau of National Affairs, Inc.

More Than Words. MP–So–Col–14 min. H Strauss & Co.

Motivation Through Job Enrichment. MP–So–Col–28 min. Bureau of National Affairs, Inc.

New Tools for Learning. MP–So–Col/BW–12 min. Encyclopaedia Brittanica Films, Inc.

Office Courtesy—Meeting the Public. MP–So–Col/BW–12 min. Encyclopaedia Brittanica Films, Inc.

Office Etiquette. MP–So–Col–15 min. Encyclopaedia Britannica Films, Inc.

Office Supervisor's Problems. Six 3 min. films with a discussion leader's manual. MP–So–Col/BW. McGraw-Hill

Office Supervisor's Problems Series, The. 8MP–So–Col–8 min. McGraw-Hill

Office Teamwork. MP–So–Col/BW–12 min. Encyclopaedia Britannica Films, Inc.

Pattern for Instruction. MP–So–Col/BW–21 min. Roundtable Films

Polish Up Your Personality. FS–Si–Col. Society for Visual Education, Inc.

Production 5118. MP–So–Col–28 min. Champion Paper and Fibre Co.

Small World of John J. Pennyfeather, The. MP–So–Col–50 min. Employers Mutual of Wausau

Something to Work For. MP–So–BW/Col–30 min. Roundtable Films

Styles of Leadership. MP–So–BW/Col–26 min. Roundtable Films

Supervisory Problems in the Office. 12FS–So–BW/Col–11 min. per filmstrip. McGraw-Hill

Ten-Key Touch Training Course. 25FS–Si–BW. (Operators and instructor manuals) Educational Developmental Laboratories

The Case of the Missing Magnets. MP–So–Col–11 min. Bureau of National Affairs, Inc.

The Challenge of Leadership. MP–So–Col–11 min. Bureau of National Affairs, Inc.

The Effective Executive. Series of 5 films—MP–So–Col–25 min. each. Bureau of National Affairs, Inc.

The Management of Human Assets. MP–So–Col–28 min. Bureau of National Affairs, Inc.

The Man in the Middle. MP–So–BW–28 min. Roundtable Films

The National Managerial Test. MP–So–Col/BW–60 min. Roundtable Films

The Real Security. MP–So–Col–30 min. Bureau of National Affairs, Inc.

The Self-Motivated Achiever. MP–So–Col–28 min. Bureau of National Affairs, Inc.

The Trouble with Archie. MP–So–Col–11 min. Bureau of National Affairs, Inc.

The Way I See It. MP–So–BW/Col–23 min. Roundtable Films

The Winning Combination. MP–So–Col–11 min. Bureau of National Affairs, Inc.

Understanding Motivation. MP–So–Col–28 min. Bureau of National Affairs, Inc.

Writing Better Business Letters. MP–So–Col/BW–10 min. Coronet Instructional Films

You Gotta Face People. FS–35mm–So–Col–30 min. Continental Films

You, Yourself, Incorporated. MP–So–Col–30 min. Bureau of National Affairs, Inc.

☆ U.S. GOVERNMENT PRINTING OFFICE: 1970– 354–980